



# FAIRFAX COUNTY

## DEPARTMENT OF PROCUREMENT & MATERIAL MANAGEMENT

12000 GOVERNMENT CENTER PARKWAY, SUITE 427  
FAIRFAX, VIRGINIA 22035-0013

**V I R G I N I A**

TELEPHONE: (703) 324-3201 FAX: (703) 324-3228 TTY: 1-800-828-1140

<b>ISSUE DATE:</b> December 2, 2016	<b>REQUEST FOR PROPOSAL NUMBER:</b> 2000002041	<b>TITLE:</b> Physical Examinations and Medical Evaluations
<b>DEPARTMENT:</b> Department of Human Resources	<b>DUE DATE/TIME:</b> January 6, 2017 at 10:00 A.M.	<b>CONTRACT SPECIALIST :</b> Penny Crawley (703)324-3884 <a href="mailto:penny.crawley@fairfaxcounty.gov">penny.crawley@fairfaxcounty.gov</a>

**Proposals** - In accordance with the following and in compliance with all terms and conditions, unless otherwise noted, the undersigned offers and agrees, if the proposal is accepted, to furnish items or services for which prices are quoted, delivered or furnished to designated points within the time specified. It is understood and agreed that with respect to all terms and conditions accepted by Fairfax County the items or services offered and accompanying attachments shall constitute a contract.

**Note:** Fairfax County does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment in the performance of its procurement activity.

### NAME AND ADDRESS OF FIRM:

Telephone/Fax No.:

E-Mail Address:

Federal Employer Identification No or

Federal Social Security No.(Sole  
Proprietor)

Prompt Payment Discount: \_\_\_% for payment within \_\_\_days/net  
\_\_\_days

State Corporation Commission (SCC)  
Identification No.

**By signing this proposal, Offeror certifies, acknowledges, understands, and agrees to be bound by the conditions set forth in the General Conditions and Instructions to Bidders as described in Appendix A, the Certification of Ethics in Public Contracting (Appendix B), and all other relevant certifications as set forth herein.**

**BUSINESS CLASSIFICATION – Described in Appendix B - CHECK ONE:** ☐ LARGE (Y) ☐ SMALL (B)

☐ MINORITY-OWNED SMALL (X) ☐ MINORITY OWNED LARGE (V) ☐ WOMEN-OWNED SMALL (C)

☐ WOMEN OWNED LARGE (A) ☐ NON PROFIT (9)

CHECK ONE: ☐ INDIVIDUAL ☐ PARTNERSHIP ☐ CORPORATION

State in which Incorporated: \_\_\_\_\_

Vendor Legally Authorized  
Signature

Date

Print Name and Title

Sealed proposals subject to terms and conditions of this Request for Proposal will be received by the Fairfax County Purchasing Agent at 12000 Government Center Parkway, Suite 427, Fairfax, Virginia 22035-0013 until the date/time specified above.

AN EQUAL OPPORTUNITY PURCHASING ORGANIZATION



## **SPECIAL PROVISIONS**

### **1. SCOPE OF SERVICES:**

- 1.1 The purpose of this Request for Proposal is to solicit sealed proposals to establish a contract through competitive negotiation for the provision of cost effective occupational services for Fairfax County Government (FCG) and Fairfax County Public Schools (FCPS) as listed below:
  - a. Physical examinations, pre-employment, annual, and periodic testing, for non-public safety applicants and employees of FCG and FCPS.
  - b. Fitness for Duty examinations (FFD) for FCG and FCPS employees when requested by agency due to performance or conduct issues possibly precipitated by a medical event to include a Functional Capacity Exam as defined by [The American Occupational Therapy Association](#) and in some instances a psychiatric evaluation.
  - c. Medical Evaluations as the Medical Examining Board for FCPS members on disability retirement, in compliance with the Educational Employees' Supplementary Retirement System of Fairfax County (ERFC) (Exhibit A).
  - d. [Department of Transportation \(DOT\)](#) physical examinations for FCG and FCPS commercial motor vehicle drivers as required by the Commonwealth of Virginia.
- 1.2. As it is the County's intent to award a contract to a single offeror, offerors must submit a proposal for all services listed above.

### **2. CONTRACT PERIOD AND RENEWAL:**

- 2.1. This contract will begin on the date of award, and terminate on April 30, 2022.
- 2.2. The obligation of the County to pay compensation due the contractor under the contract or any other payment obligations under any contract awarded pursuant to this Request for Proposal is subject to appropriations by the Fairfax County Board of Supervisors to satisfy payment of such obligations. The County's obligations to make payments during subsequent fiscal years are dependent upon the same action. If such an appropriation is not made for any fiscal year, the contract shall terminate effective at the end of the fiscal year for which funds were appropriated and the County will not be obligated to make any payments under the contract beyond the amount appropriated for payment obligations under the contract. The County will provide the contractor with written notice of non-appropriation of funds within thirty (30) calendar days after action is completed by the Board of Supervisors. However, the County's failure to provide such notice shall not extend the contract into a fiscal year in which sufficient funds have not been appropriated.

### **3. BACKGROUND:**

- 3.1. FCG along with FCPS contracts with Virginia board certified physicians and medical professionals to perform pre-employment and annual physical examinations as required for several occupational groups of employees. These employees work primarily in labor and trade areas. Included in this group of employees are drivers of commercial motor vehicles including school bus drivers and hazmat drivers, who are required to undergo medical examinations, including drug and alcohol testing, in accordance with the Federal and Virginia [Department of Transportation \(DOT\) standards](#) and Fairfax County's Commercial Driver's License Program. In 2015 there were 1618 total physicals, 280 pre-employment physicals and 312 DOT physicals performed.
- 3.2. On a limited number of occasions each year (6 in 2015) an employee will be required to be evaluated to determine his or her fitness for duty as a result of safety, performance, conduct, or medical issues that have arisen. Such evaluations include a series of standardized tests measuring physical strength, range of motion, stamina, and tolerance to functional activities, and may include lifting and carrying as well as behavioral health assessments to determine an employee's occupational fitness to return to the workplace.

## **SPECIAL PROVISIONS**

- 3.3. The Medical Examining Board (Board) designated by the ERFC Board of Trustees evaluates all applicants retiring due to a disability. This Board reviews the medical records of employees retiring due to a disability, then performs medical and psychological exams to verify members' physical or mental disability status. The Board then reports findings and makes recommendations to the ERFC Board of Trustees. The Board is also responsible for medical reevaluations for members of the ERFC.

### **4. TASKS TO BE PERFORMED:**

Qualified offerors are encouraged to submit a proposal for the following occupational physical examination and medical evaluation services:

#### **4.1. Pre-Employment and job-related examinations**

- a. Perform physical examinations and clinical testing to determine if an individual is able to perform the essential functions of a position in accordance with the physical requirements and working conditions as provided by FCG. Required examinations, testing and immunizations are as follows:
  1. Vision (color)/distance testing
  2. Audiogram screening
  3. Urinalysis
  4. Complete blood count
  5. PPD skin test with follow up chest x-ray if indicated
  6. Respirator clearance for employees who use respirators in accordance with [OSHA \(29CFR 1910.134\)](#)
  7. Asbestos surveillance questionnaire
  8. Cholinesterase testing
  9. Pulmonary Function test
  10. Immunizations – Hepatitis B, , and Tetanus
- b. Perform DOT examinations for commercial motor vehicle drivers including hazmat and school bus drivers.
- c. Perform Tuberculin tests for approximately 275 newly hired commercial vehicle drives.
- d. Record review of prescription medication change.
- e. Conduct medical evaluations for commercial motor vehicle drivers who are medically unable to provide urine specimens.
- f. Have the capacity to conduct large numbers of physical examinations and adhere to a specified maximum time of 1.5 hours which includes wait time and exam time.
- g. Have multiple exam sites that are reasonably geographically dispersed to minimize loss of work time for employees reporting for medical exams.
- h. Have facilities that provide parking for large commercial vehicles such as school buses and trucks
- i. Have staff available for consultation with FCG and FCPS staff between the hours of 8:00 A.M. and 5:00 P.M., Monday through Friday.
- j. Retain all medical records associated with examinations and evaluations.
- k. Notify and submit resumes to FCG and FCPS 30 days prior to any provider staffing changes.

#### **4.2. Fitness for Duty Examinations**

- a. Perform physical examinations and clinical assessments aligned with specific job descriptions to address safety, performance, conduct, mental or medical issues, as well as return to duty for non-work related injuries to determine if an individual is occupationally fit to perform the essential functions.

### **SPECIAL PROVISIONS**

- b. Conduct specialty assessments in certain cases such as behavioral health which may be inclusive of psychiatric and psychological assessments and ergonomic examinations.
  - c. Have staff available for consultation with FCG and FCPS staff between the hours of 8:00 A.M. and 5:00 P.M., Monday through Friday.
  - d. Retain all medical records associated with examinations and evaluations.
  - e. Notify and submit resumes to FCG and FCPS 30 days prior to any provider staffing changes.
- 4.3. Medical Examining Board
- a. Act as the Medical Examining Board for FCPS' Board of Trustees, whose responsibilities include the medical evaluation and examination of disability retirees from the ERFC. (The Contractor will be provided medical information on the "Application for Disability Retirement" form (Exhibit A);
  - b. Arrange and perform all medical examinations within two weeks from the date of receipt of medical records for retirees to determine if a disabling medical or mental condition renders or continues to render the retiree unable to perform essential duties of the assigned position with FCPS, as required for retirement under this system;
  - c. Review medical records from members' personal physician, and all supporting documentation submitted by members as proof of a continuing disability;
  - d. Verify members' disability status when requested by the Office of Benefits prior to the member's service retirement date.
  - e. Advise the designated staff member(s) in the Retirement Section evaluation, if the medical examination is to be waived;
  - f. Retain all medical records associated with examinations and evaluations.
  - g. Notify and submit resumes to FCG and FCPS 30 days prior to any provider staffing changes.
  - h. Have staff available for consultation with FCG and FCPS staff between the hours of 8:00 A.M. and 5:00 P.M., Monday through Friday.

### **5. CONTRACTOR REQUIREMENTS:**

#### 5.1 All qualified offerors are required to:

- a. Be licensed to practice medicine in the Commonwealth of Virginia and certified by the Virginia Board of Medicine.
- b. Adhere to the FCPS physical examination requirements as stated in the Virginia Administrative Code (8VAC20-70-280) and the Federal Motor Carrier Safety Administration (FMCSA)(49CFR Part391.41) and outlined on the Application for Physician's Certificate (Exhibit C).
- c. Be listed on the FMCSA's National Registry of Medical Examiners to perform commercial vehicle driver exams.
- d. Adhere to the FMCA (49CFR Part391.41) and FCG requirements as outlined in [Risk Management's CDL Manual](#).

#### 5.2 Reporting and Representation

- a. Communicate all exam results to designated FCG or FCPS staff within 3 days.
- b. Notify FCG or FCPS when an individual fails to report or refuses to complete any portion of an exam or test on the same day of the scheduled appointment.
- c. Report in writing all findings and recommendations on the following forms:
  - 1. FCG : Offeror's letterhead
  - 2. FCPS Medical Examining Board: Physician's Report (Exhibit B)
  - 3. FCPS: Application for Physician's Certificate (Exhibit C)
- d. Medical Examining Board: Notify the Board of Trustees of any delays in either the scheduling of medical examinations or providing the written medical reports, and the reason for such delay(s);

## **SPECIAL PROVISIONS**

- e. Present medical findings and recommendations in grievances and hearings.
- f. Maintain all records in compliance with federal and state regulations.
- g. Submit to each program administrator, of FCG and FCPS monthly statistical reports that include: department, number and cost of Fit For Duty Exams, DOT Pre-Employment Exams, DOT Physicals and Non-DOT Physicals, as well as an annual tabulated report.

### **6. COUNTY RESPONSIBILITIES:**

- 6.1 Provide Contractor with all relevant position descriptions for employee assessments.
- 6.2 Provide Contractor with a Summary Statement of concern/issue or event precipitating FFD request.

### **7. TECHNICAL PROPOSAL INSTRUCTIONS:**

- 7.1 The offeror must submit the Technical Proposal in a separate binder containing the following Information. This information will be considered the minimum content of the proposal. Proposal contents shall be arranged in the same order and identified with headings as presented herein.
  - a. Name of firm submitting proposal; main office address; when organized; if a corporation, when and where incorporated; appropriate Federal, State, and County registration numbers.
  - b. Understanding of the problem and technical approach.
    - 1. Statement and discussion of the requirements as they are analyzed by the offeror.
    - 2. Offeror's proposed definitive Scope of Work with explanation of technical approaches and a detailed outline of the proposed program for executing the requirements of the technical scope and achieving project objectives.
    - 3. Maps or other geographic representations of exam site locations throughout Fairfax County.
    - 4. Offeror should demonstrate an awareness of difficulties in the completion of this undertaking, and a plan for surmounting them. Special attention should be given to methodological issues that will be encountered in such a project.
- 7.2. Preliminary Work Plan:
 

The offeror must present a description of the phases or segments into which the proposed program can logically be divided and performed, together with flow charts. The technical narrative should address separately each of the tasks and requirements described in this Request for Proposal and responses should be keyed to appropriate paragraph numbers. This section should also contain a discussion of any changes proposed by the offeror that substantially differ from the project scope described in these Special Provisions.

This section should include detailed descriptions of activities that are to occur, significant milestones, and anticipated deliverables.
- 7.3. Treatment of the Issues:
 

In this section, the offeror may also comment if deemed appropriate, on any aspect of the Request for Proposal, including suggestions on possible alternative approaches to the coverage, definition, development, and organization of the issues presented in the "Tasks to be Performed" section, and may propose alternative approaches.
- 7.4. Statement of Qualifications:
 

The statement of Qualifications must include a description of organizational and staff experience, and resumes of proposed staff.

## **SPECIAL PROVISIONS**

- a. Organizational and Staff Experience: Offerors must describe their qualifications and experience to perform the work described in this Request for Proposal. Information about experience should include direct experience with the specific subject matter.
- b. References: Special notation must be made of similar or related programs performed in the past 5 years and must include four organization names, addresses, and names of contact persons, and telephone numbers for such reference. Two references should include public administrative entities and two should represent educational institutions of similar or greater size. References should not be from FCG or FCPS.
- c. Personnel: Full-time and part-time staff, proposed consultants and subcontractors who may be assigned direct work on this project should be identified. Information is required which will show the composition of the task or work group, its specific qualifications, and recent relevant experience. Special mention shall be made of direct technical supervisors and key technical personnel, and approximate percentage of the total time each will be available for this project. The technical areas, character and extent of participation by any subcontractor or consultant activity must be indicated and the anticipated sources will be identified.

Resumes of staff and proposed consultants are required indicating education, background, recent relevant experience with the subject matter of the project. Current telephone numbers must be included.

- d. A staffing plan is required which describes the Offeror's proposed staff distribution to accomplish this work. The staffing plan should indicate a chart that partitions the time commitment of each professional staff member across the proposed tasks and a timeline for the project. It is mandatory that this section identify the key personnel who are to work on the project, their relationship to the contracting organization, work location, and amount of time to be devoted to the project.
- e. Financial Statements: The offeror shall provide an income statement and balance sheet from the most recent reporting period.

- 7.5. The personnel named in the technical proposal will remain assigned to the project throughout the period of this contract. No diversion or replacement may be made without submission of a resume of the proposed replacement with final approval being granted by the County Purchasing Agent.

## **8. COST PROPOSAL INSTRUCTIONS:**

- 8.1. The County **IS NOT** requesting Cost proposals at the present time. The County will request a Cost proposal under separate cover from the top ranked offeror at a later date. The specific cost proposal format will be provided to the top rated offeror at the time the request is made. The County reserves the right to require that Cost proposals be submitted by a specified deadline. The County may reject any Cost proposals that are submitted after the designated date and time.

## **9. PRICING:**

- 9.1. The subsequent contract will be a fee for service price agreement. The fee(s) will remain firm and will include all charges that may be incurred in fulfilling the requirements of the contract during the first 365 days. Changes in cost for any subsequent contract years may be based on the Consumer Price Index (CPI-U), Table 10 U.S. City Averages, or other relevant indices.
- 9.2. The request for a change in the unit price shall include as a minimum, (1) the cause for the adjustment; (2) proposed effective date; and, (3) the amount of the change requested with documentation to support the requested adjustment (i.e., appropriate Bureau of Labor Statistics, Consumer Price Index (CPI-U), change in manufacturer's price, etc.).

## **SPECIAL PROVISIONS**

- 9.3. Price decreases shall be made in accordance with paragraph 43 of the General Conditions & Instructions to Offerors. (Appendix A)

### **10. TRADE SECRETS/PROPRIETARY INFORMATION:**

- 10.1. Trade secrets or proprietary information submitted by an offeror in connection with a procurement transaction shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, offerors must invoke the protections of this section prior to or upon submission of the data or other materials.
- 10.2. The offeror must identify the data or other materials to be protected and state the reasons why protection is necessary. Disposition of material after award(s) should be stated by the offeror.

### **11. CONTACT FOR CONTRACTUAL MATTERS:**

- 11.1. All communications and requests for information and clarifications shall be directed to the following procurement official:

Penny Crawley, Contract Specialist II  
Department of Procurement and Material Management  
Telephone: (703) 324-3884  
E-mail: [penny.crawley@fairfaxcounty.gov](mailto:penny.crawley@fairfaxcounty.gov).

- 11.2. No attempt shall be made by any offeror to contact members of the Selection Advisory Committee (SAC) about this procurement (see paragraph 16.3).

### **12. REQUIRED SUBMITTALS:**

- 12.1. Each Offeror responding to this Request for Proposal must supply all the documentation required in the RFP. Failure to provide documentation with the Offeror's response to the RFP will result in the disqualification of the Offeror's proposal.

### **13. SUBMISSION OF PROPOSAL:**

- 13.1. One (1) original (duly marked) and seven (7) copies of the Technical proposal shall be delivered to the following address in sealed envelopes or packages with the proposal number, title and the offerors name and address on the outside. It is requested that one copy of the proposal be provided in a CD format. The offeror must include a notarized statement that the CD version is a true copy of the printed version. Electronically stamped delivery receipts are available.

Department of Procurement and Material Management  
12000 Government Center Parkway, Suite 427  
Fairfax, Virginia 22035-0013  
Telephone: 703-324-3201

- 13.2. Offerors are reminded that changes to the request for proposal, in the form of addenda, are often issued between the issue date and within three (3) days before the due date of the solicitation. All addenda MUST be signed and submitted to the Department of Procurement and Material Management, 12000 Government Center Parkway, Suite 427, Fairfax, VA 22035 before the due date/time or must accompany the proposal. Notice of addenda will be posted on Eva and the DPSM current solicitation webpage. It is the Offeror's responsibility to monitor the web page for the most current addenda at [www.fairfaxcounty.gov/dpsm/solic/htm](http://www.fairfaxcounty.gov/dpsm/solic/htm).
- 13.3. It is the Offeror's responsibility to clearly identify and to describe the services being offered in response to the Request for Proposal. Offerors are cautioned that organization of their response, as well as thoroughness is critical to the County's evaluation process. The RFP forms must be completed legibly and in their entirety; and all required supplemental information must be furnished and presented in an organized, comprehensive and easy to follow manner.

## **SPECIAL PROVISIONS**

- 13.4. Unnecessarily elaborate brochures of other presentations beyond that sufficient to present a complete and effective proposal is not desired. Elaborate artwork, expensive paper, bindings, visual and other presentation aids are not required. The County encourages the use of recycled paper, therefore it is urged that proposals be submitted on paper made from or with recycled content and be printed on both sides.
- 13.5. Each original and set of the seven (7) copies of the proposal shall consist of:
  - a. Cover sheet (DPMM32)
  - b. Technical proposal as required in the Special Provisions, paragraph 7, **TECHNICAL PROPOSAL INSTRUCTIONS**. (Appendix B should be included in the Technical proposal).
- 13.6. By executing the cover sheet (DPMM32), Offeror acknowledges that they have read this Request for Proposal, understand it, and agree to be bound by its terms and conditions. Proposals may be submitted by mail or delivered in person.

### **14. LATE PROPOSALS:**

- 14.1. Proposals received in the Office of the County Purchasing Agent after the date and time prescribed shall not be considered for contract award and shall be returned to the offeror.

### **15. PERIOD THAT PROPOSALS REMAIN VALID:**

- 15.1. Proposals will remain valid for a period of one-hundred and twenty days (120) calendar days after the date specified for receipt of proposals.

### **16. BASIS FOR AWARD:**

- 16.1. This Request for Proposal is being utilized for competitive negotiation. Under the competitive negotiation process, a contract may be awarded to the responsible offeror whose proposal is determined to be the most advantageous to the County, taking into consideration price and the evaluation factors set forth in the Request for Proposal. The County reserves the right to make multiple awards as a result of this solicitation.
- 16.2. A Selection Advisory Committee has been established to review and evaluate all proposals submitted in response to this Request for Proposal. The Committee shall conduct a preliminary evaluation of all proposals on the basis of the information provided with the proposal, and the evaluation criteria listed below. Based upon this review, the cost proposals of the highest rated offeror(s) will then be reviewed.
- 16.3. The County shall engage in individual discussions with two or more offerors deemed fully qualified, responsible and suitable on the basis of initial responses and with emphasis on professional competence, to provide the required services. Repetitive informal interviews shall be permissible. The offerors shall be encouraged to elaborate on their qualifications and performance data or staff expertise pertinent to the proposed project, as well as alternative concepts. In addition, offerors shall be informed of any ranking criteria that will be used by the public body in addition to the review of the professional competence of the offeror. At this discussion stage, the County may discuss nonbinding estimates of total project costs, including, but not limited to, life-cycle costing, and where appropriate, nonbinding estimates of price for services. Proprietary information from competing offerors shall not be disclosed to the public or to competitors. At the conclusion of discussion, outlined in this subdivision, on the basis of evaluation factors published in this Request for Proposal and all information developed in the selection process to this point, the Selection Advisory Committee shall select in the order of preference two or more offerors whose professional qualifications and proposed services are deemed most meritorious. Negotiations shall then be conducted, beginning with the offeror ranked first. At this time, the offeror and the Selection Advisory Committee may negotiate any changes desired in the offer if deemed in the best interest of Fairfax County. If a contract satisfactory and advantageous to the public body can be



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negotiated at a price considered fair and reasonable, the award shall be made to that offeror. Otherwise, negotiations with the offeror ranked first shall be formally terminated and negotiations conducted with the offeror ranked second, and so on until such a contract can be negotiated at a fair and reasonable price. Should the County determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified and suitable than the others under consideration, a contract may be negotiated and awarded to that offeror.

The Committee will make appropriate recommendations to the County Executive and Board of Supervisors, if appropriate, prior to actual award of contract.

### 16.4. Proposal Evaluation Criteria

The following factors will be considered in the award of this contract:

- a. Demonstrated understanding of the problem and technical approach in the performance of tasks to be performed and meeting contractor requirements. (Ref. 7.1.b. and 7.2 Technical Proposal Instructions) – 50 points
  - b. Demonstrated qualifications of firm to include provided references with appropriately qualified and experienced personnel. (Ref. 7.4 Statement of Qualifications) – 50 points
- 16.5. Fairfax County reserves the right to make on-site visitations to assess the capabilities of individual offerors and to contact references provided with the proposal.
- 16.6. The County Purchasing Agent may arrange for discussions with firms submitting proposals, if required, for the purpose of obtaining additional information or clarification.
- 16.7. Offerors are advised that, in the event of receipt of an adequate number of proposals, which, in the opinion of the County Purchasing Agent, require no clarifications and/or supplementary information, such proposals may be evaluated without further discussion. Consequently, offerors should provide complete, thorough proposals with the offerors most favorable terms. Should proposals require additional clarification and/or supplementary information, offerors should submit such additional material in a timely manner.
- 16.8. Proposals which, after discussion and submission of additional clarification and/or supplementary information, are determined to meet the specifications of this Request for Proposal will be classified as "acceptable". Proposals found not to be acceptable will be classified as "unacceptable" and no further discussion concerning same will be conducted.
- 16.9. The County may cancel this Request for Proposal or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous.

### 17. **INSURANCE:**

- 17.1. The contractor is responsible for its work and for all materials, tools, equipment, appliances, and property of any and all description used in connection with the project, whether owned by the contractor or by the County. The contractor assumes all risks of direct and indirect damage or injury to any person or property wherever located, resulting from any action, omission, commission or operation under the contract, or in connection in any way whatsoever with the contracted work.
- 17.2. The Contractor shall, during the continuance of all work under the Contract provide the following:
- a. Maintain statutory Worker's Compensation and Employer's Liability insurance in limits of not less than \$100,000 to protect the Contractor from any liability or damages for any injuries (including death and disability) to any and all of its employees, volunteers, or subcontractors, including any and all liability or damage which may arise by virtue of any statute or law in force within the Commonwealth of Virginia, or which may be hereinafter enacted.

**SPECIAL PROVISIONS**

- b. The contractor agrees to maintain Commercial General Liability insurance in the amount of \$1,000,000 per occurrence/aggregate, to protect the contractor, its subcontractors, and the interest of the County, against any and all injuries to third parties, including bodily injury and personal injury, wherever located, resulting from any action or operation under the contract or in connection with contracted work. The General Liability insurance shall also include the Broad Form Property Damage endorsement, in addition to coverage's for explosion, collapse, and underground hazards, where required.
  - c. The contractor agrees to maintain owned, non-owned, and hired Automobile Liability insurance, in the amount of \$1,000,000 per occurrence/aggregate, including property damage, covering all owned, non-owned borrowed, leased, or rented vehicles operated by the Contractor. In addition, all mobile equipment used by the Contractor in connection with the contracted work will be insured under either a standard Automobile Liability policy, or a Comprehensive General Liability policy.
  - d. The contractor agrees to maintain Professional Liability insurance in the amount of \$1,000,000 per occurrence/aggregate to cover each individual professional staff.
  - e. Liability insurance may be arranged by General Liability and Automobile Liability policies for the full limits required, or by a combination of underlying Liability policies for lesser limits with the remaining limits provided by an Excess or Umbrella Liability policy.
  - f. Rating Requirements:
    - 1. The Contractor agrees to provide insurance issued by companies admitted within the Commonwealth of Virginia, with the Best's Key Rating of at least A: VI.
    - 2. European markets including those based in London, and the domestic surplus lines markets that operate on a non-admitted basis are exempt from this requirement provided that the contractor's broker can provide financial data to establish that a market is equal to or exceeds the financial strengths associated with the A.M. Best's rating of A:VI or better.
  - g. Indemnification: Article 63 of the General Conditions and Instructions to Bidders (Appendix A) shall apply.
  - h. The Contractor will provide an original, signed Certificate of Insurance citing the contract number and such endorsements as prescribed herein, and shall have it filed with the County Purchasing Agent and/or Risk Manager before any work is started.
  - i. If the Contractor delivers services from a County-leased facility, the Contractor is required to carry property insurance on all equipment, to include County-owned installed and maintained equipment used by the contractor while in their care, custody and control for use under this contract.
- 17.3. No change, cancellation, or non-renewal shall be made in any insurance coverage without a forty-five day written notice to the County Purchasing Agent and/or Risk Manager. The Contractor shall furnish a new certificate prior to any change or cancellation date. The failure of the Contractor to deliver a new and valid certificate will result in suspension of all payments until the new certificate is furnished.
- 17.4. Precaution shall be exercised at all times for the protection of persons (including employees) and property.

**18. METHOD OF ORDERING:**

- 18.1. The County may use two (2) different methods of placing orders from the final contract: Purchase Orders (PO's) and approved County procurement cards.
- 18.2. A Purchase Order (PO) may be issued to the contractor on behalf of the County agency ordering the items/services covered under this contract. An issued PO will become part of the resulting contract. The purchase order indicates that sufficient funds have been obligated as required by Title 15.2-1238 of the Code of the Commonwealth of Virginia.

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- 18.3. Procurement Card orders and payments may also be made by the use of a Fairfax County or Fairfax County Public Schools "Procurement" Card. The Procurement Card is currently a Master Card. Contractors are encouraged to accept this method of receiving orders.
- 18.4. Regardless of the method of ordering used, solely the contract and any modification determine performance time and dates.
- 18.5. Performance under this contract is not to begin until receipt of the purchase order, Procurement Card order, or other notification to proceed by the County Purchasing Agent and/or County agency to proceed. Purchase requisitions shall not be used for placing orders.

### **19. INVOICING:**

- 19.1. For all FCPS exams invoices must be submitted to:  
 Fairfax County Public Schools  
 Office of Equity and Employee Relations  
 Attn: Virginia Sellers  
 8115 Gatehouse Road, Suite 2500  
 Falls Church, Virginia 22042
- 19.2. For FCG all fitness for duty exams invoices must be submitted to:  
 Fairfax County Government  
 Department of Human Resources  
 Attn: Leia Huggins Ellis  
 12000 Government Center Parkway, Suite 270  
 Fairfax, VA 22035
- 19.3. For FCG physical exams (DOT Pre-Employment Exams, DOT Physicals and Non-DOT Physicals), the contractor must invoice each FCG department using the final contract separately. Invoices for all users of the contract must meet County requirements, unless otherwise indicated. The Contractor must send each department an itemized monthly invoice (or as agreed to between the parties), which must include the information listed below:
  - a. Employee name;
  - b. The name of the County department;
  - c. Date of services
  - d. The type of services; and,
  - e. The itemized cost for each item/service.
- 19.4. The FCG program administrator and county departments must receive monthly invoices by the 10th of each month following the month the Contractor provided the service. In addition, the Contractor will provide each a monthly and year-to-date utilization report which lists all information shown above in paragraph 19.3 a-e. The Contractor will mail the invoices and the utilization reports to the individuals identified in the final contract.

### **20. PAYMENTS:**

- 20.1. The County will pay the Contractor based upon completion, acceptance, and approval by the County of each task and requirement as outlined in the Special Provisions.

### **21. CHANGES:**

- 21.1. Fairfax County may, at any time, by written order, require changes in the services to be performed by the Contractor. If such changes cause an increase or decrease in the Contractors cost of, or time required for, performance of any services under this contract, an equitable adjustment shall be made and the contract shall be modified in writing accordingly. The County Purchasing Agent must approve all work that is beyond the scope of this Request for Proposal.

## **SPECIAL PROVISIONS**

- 21.2. No services for which an additional cost or fee will be charged by the Contractor shall be furnished without the prior written authorization of the Fairfax County Purchasing Agent.

### **22. DELAYS AND SUSPENSIONS:**

- 22.1. The County may direct the Contractor, in writing, to suspend, delay, or interrupt all or any part of the work of this contract for the period of time deemed appropriate for the convenience of the County. The County will extend the Contractor's time of completion by a period of time that in the discretion of the Purchasing Agent is reasonably suited for completion of work. The County may further amend the contract by mutual agreement for any increase in the cost of performance of the contract (excluding profit) resulting solely from the delay or suspension of the contract. No adjustment shall be made under this clause for any delay or interruption resulting from any other cause, including the fault or negligence of the Contractor.
- 22.2. If the County does not direct the Contractor, in writing, to suspend, delay, or interrupt the contract, the Contractor must give the County Purchasing Agent written notice if Fairfax County fails to provide data or services that are required for contract completion by the Contractor. The County may extend the Contractor's time of completion by a period of time that in the discretion of the Purchasing Agent is reasonably suited for completion of work. The County may further amend the contract by mutual agreement for any increase in the cost of performance of the contract (excluding profit) resulting solely from the delay or suspension of the contract. No adjustment shall be made under this clause for any delay or interruption resulting from any other cause, including the fault or negligence of the Contractor.
- 22.3. The Contractor shall continue its work on other phases of the project or contract, if in the sole discretion of the Purchasing Agent such work is not impacted by the County's delay, suspension, or interruption. All changes to the work plan or project milestones shall be reflected in writing as a contract amendment.

### **23. ACCESS TO AND INSPECTION OF WORK:**

- 23.1. The Fairfax County Purchasing Agent and using agencies will, at all times, have access to the work being performed under this contract wherever it may be in progress or preparation.

### **24. PROJECT AUDITS:**

- 24.1 The Contractor shall maintain books, records and documents of all costs and data in support of the services provided. Fairfax County or its authorized representative shall have the right to audit the books, records and documents of the contractor under the following conditions:
- a. If the contract is terminated for any reason in accordance with the provisions of these contract documents in order to arrive at equitable termination costs;
  - b. In the event of a disagreement between the contractor and the County on the amount due the Contractor under the terms of this contract;
  - c. To check or substantiate any amounts invoiced or paid which are required to reflect the costs of services, or the Contractor's efficiency or effectiveness under this contract; and,
  - d. If it becomes necessary to determine the County's rights and the contractor's obligations under the contract or to ascertain facts relative to any claim against the Contractor that may result in a charge against the County.
- 24.2. These provisions for an audit shall give Fairfax County unlimited access during normal working hours to the Contractor's books and records under the conditions stated above.
- 24.3. Unless otherwise provided by applicable statute, the contractor, from the effective date of final payment or termination hereunder, shall preserve and make available to Fairfax County for a period of three (3) years thereafter, at all reasonable times at the office of the Contractor but without direct charge to the County, all its books, records documents and other evidence bearing on the costs and expenses of the services relating to the work hereunder.

## **SPECIAL PROVISIONS**

- 24.4. Fairfax County's right to audit and the preservation of records shall terminate at the end of three (3) years as stated herein. The Contractor shall include this "Right of Audit and Preservation of Records" clause in all subcontracts issued by it and they shall require same to be inserted by all lower tier subcontractors in their subcontracts, for any portion of the work.
- 24.5. Should the Contractor fail to include this clause in any such contract or lower tier contract, or otherwise fail to insure Fairfax County's rights hereunder, the Contractor shall be liable to Fairfax County for all reasonable costs, expenses and attorney's fees which Fairfax County may have to incur in order to obtain an audit or inspection of or the restoration of records which would have otherwise been available to Fairfax County from said persons under this clause. Such audit may be conducted by Fairfax County or its authorized representative.

### **25. DATA SOURCES:**

- 25.1. The County will provide the Contractor all available data possessed by the County that relates to this contract. However, the Contractor is responsible for all costs for acquiring other data or processing, analyzing or evaluating County data.

### **26. SAFEGUARDS OF INFORMATION:**

- 26.1 Unless approved in writing by the County Purchasing Agent, the Contractor may not sell or give to any individual or organization any information, reports, or other materials given to, prepared or assembled by the Contractor under the final contract.

### **27. ORDER OF PRECEDENCE:**

- 27.1. In the event of conflict, the Acceptance Agreement (provided at contract award) and the Special Provisions of this contract shall take precedence over the General Conditions and Instructions to Bidders, (Appendix A).

### **28. SUBCONTRACTING:**

- 28.1. If one or more subcontractors are required, the contractor is encouraged to utilize small, minority-owned, and women-owned business enterprises. For assistance in finding subcontractors, contact the Virginia Department of Business Assistance <http://www.dba.state.va.us>; the Virginia Department of Minority Business Enterprise <http://www.dmbe.state.va.us>; local chambers of commerce and other business organizations.
- 28.2. As part of the contract award, the prime contractor agrees to provide the names and addresses of each subcontractor, that subcontractor's status as defined by Fairfax County, as a small, minority-owned and/or woman-owned business, and the type and dollar value of the subcontracted goods/services provided. Reference Appendix B to this solicitation.

### **29. USE OF CONTRACT BY OTHER PUBLIC BODIES:**

- 29.1. Reference Paragraph 75, General Conditions and Instructions to Bidders, Cooperative Purchasing. Offerors are advised that the *resultant* contract(s) may be extended, with the authorization of the Offeror, to other public bodies, or public agencies or institutions of the United States to permit their use of the contract at the same prices and/or discounts and terms of the resulting contract. If any other public body decides to use the final contract, the Contractor(s) must deal directly with that public body concerning the placement of orders, issuance of purchase orders, contractual disputes, invoicing and payment. The County of Fairfax acts only as the "Contracting Agent" for these public bodies. Failure to extend a contract to any public body will have no effect on consideration of your offer. (See Appendix B for sample listing).
- 29.2. It is the Contractors responsibility to notify the public body(s) of the availability of the contract(s).

### **SPECIAL PROVISIONS**

- 29.3. Other public bodies desiring to use this contract will need to make their own legal determinations as to whether the use of this contract is consistent with their laws, regulations, and other policies.
- 29.4. Each public body has the option of executing a separate contract with the Contractor(s). Public bodies may add terms and conditions required by statute, ordinances, and regulations, to the extent that they do not conflict with the contracts terms and conditions. If, when preparing such a contract, the general terms and conditions of a public body are unacceptable to the Contractor, the Contractor may withdraw its extension of the award to that public body.
- 29.5. Fairfax County **shall not** be held liable for any costs or damages incurred by another public body as a result of any award extended to that public body by the Contractor.

### **30. NEWS RELEASE BY VENDORS:**

- 30.1. As a matter of policy, the County does not endorse the products or services of a contractor. News releases concerning any resultant contract from this solicitation will not be made by a contractor without the prior written approval of the County. All proposed news releases will be routed to the Purchasing Agent for review and approval.

### **31. AMERICANS WITH DISABILITIES ACT REQUIREMENTS:**

- 31.1. Fairfax County Government is fully committed to the Americans with Disabilities Act (ADA) which guarantees non-discrimination and equal access for persons with disabilities in employment, public accommodations, transportation, and all County programs, activities and services. Fairfax County government contractors, subcontractors, vendors, and/or suppliers are subject to this ADA policy. All individuals having any County contractual agreement must make the same commitment. Your acceptance of this contract acknowledges your commitment and compliance with ADA.
- 31.2. Fairfax County is committed to a policy of nondiscrimination in all County programs, services, and activities and will provide reasonable accommodations upon request. Bidders requesting special accommodations should call the Department ADA representative at (703) 324-3201 or TTY 1-800-828-1140. Please allow seven (7) working days in advance of the event to make the necessary arrangements.

### **32. STATE CORPORATION COMMISSION IDENTIFICATION NUMBER:**

- 32.1 Pursuant to *Code of Virginia*, §2.2-4311.2 subsection B, a bidder or offeror organized or authorized to transact business in the Commonwealth pursuant to Title 13.1 or Title 50 is required to include in its bid or proposal the identification number issued to it by the State Corporation Commission (SCC). Any bidder or offeror that is not required to be authorized to transact business in the Commonwealth as a foreign business entity under Title 13.1 or Title 50 or as otherwise required by law is required to include in its bid or proposal a statement describing why the bidder or offeror is not required to be so authorized. Any bidder or offeror that fails to provide the required information may not receive an award.

# COUNTY OF FAIRFAX COMMONWEALTH OF VIRGINIA

## GENERAL CONDITIONS AND INSTRUCTIONS TO BIDDERS

(Vendor: The general rules and conditions which follow apply to all purchases and become a definite part of each formal solicitation and resulting contract award issued by the DEPARTMENT OF PURCHASING & SUPPLY MANAGEMENT, unless otherwise specified. Bidders or their authorized representatives are expected to inform themselves fully as to the conditions, requirements, and specifications before submitting bids; failure to do so will be at the bidder's own risk and relief cannot be secured on the plea of error.)

Subject to all State and local laws, policies, resolutions, and regulations and all rules, regulations and limitations imposed by legislation of the Federal Government, bids on all solicitations issued by the DEPARTMENT OF PURCHASING & SUPPLY MANAGEMENT will bind bidders to applicable conditions and requirements herein set forth unless otherwise specified in the solicitation.

**1. AUTHORITY** -The Purchasing Agent has the sole responsibility and authority for negotiating, placing and when necessary modifying every solicitation, contract and purchase order (except for capital construction projects) issued by the County of Fairfax. In the discharge of these responsibilities, the Purchasing Agent may be assisted by assigned buyers. Unless specifically delegated by the County Purchasing Agent, no other County officer or employee is authorized to order supplies or services, enter into purchase negotiations or contracts, or in any way obligate the government of the County of Fairfax for an indebtedness. Any purchase ordered or contract made which is contrary to these provisions and authorities shall be of no effect and void and the County shall not be bound thereby.

### 2. DEFINITIONS-

**AGENCY:** Any Department, Agency, Authority, Commission, Board or other unit in the Administrative Service of the County.

**BEST VALUE:** As predetermined in the solicitation, means the overall combination of quality, price, and various elements of required services that in total are optimal relative to a public body's needs.

**BID:** The offer of a bidder to provide specific goods or services at specified prices and/or other conditions specified in the solicitation.

**BIDDER/OFFEROR:** Any individual, company, firm, corporation, partnership or other organization bidding on solicitations issued by the Purchasing Agent and offering to enter into contracts with the County. The term "bidder" will be used throughout this document and shall be construed to mean "offeror" where appropriate.

**CONSULTANT SERVICES:** Any type of services required by the County, but not furnished by its own employees, which is in its nature so unique that it should be obtained by negotiation on the basis of demonstrated competence and qualification for the type of service required and at fair and reasonable compensation, rather than by competitive sealed bidding.

**CONTRACTOR:** Any individual, company, firm, corporation, partnership or other organization to whom an award is made by the County.

**COUNTY:** County of Fairfax.

**GOODS:** All material, equipment, supplies, printing, and automated data processing/information technology hardware and software.

**INFORMALITY:** A minor defect or variation of a bid or proposal from the exact requirements of the invitation to bid or the request for proposal which does not affect the price, quality, quantity or delivery schedule for the goods, services or construction being procured.

**INVITATION FOR BID (IFB):** A request which is made to prospective suppliers (bidders) for their quotation on goods or services desired by the County. The issuance of an IFB will contain or incorporate by reference the specifications and contractual terms and conditions applicable to the procurement.

**PROFESSIONAL SERVICES:** Any type of professional service performed by an independent contractor within the practice of accounting, actuarial services, architecture, dentistry, land surveying, landscape architecture, law, medicine, optometry, pharmacy, or professional engineering (which shall be procured as set forth in the Code of Virginia §2.2-4301 in the definition of competitive negotiation at paragraph 3 (a), and in conformance with the Fairfax County Purchasing Resolution).

**PURCHASING AGENT:** The Purchasing Agent employed by the Board of Supervisors of Fairfax County, Virginia.

**QUICK QUOTE (QQ):** A method of competitive bidding for the purchase or lease of goods, non professional services or for the purchase of insurance, construction, or construction management when the estimated cost thereof shall be less the \$50,000.

### **General Conditions and Instructions to Bidders**

**REQUEST FOR PROPOSAL (RFP):** A request for an offer from prospective offerors which will indicate the general terms which are sought to be procured from the offeror. The RFP will specify the evaluation factors to be used and will contain or incorporate by reference other contractual terms and conditions applicable to the procurement.

**RESPONSIBLE BIDDER/OFFEROR:** An individual, company, firm, corporation, partnership or other organization having the capability in all respects to perform fully the contract requirements, and also having the moral and business integrity and reliability which will assure good faith performance, and having been prequalified, if required. (Reference paragraph 24, General Conditions and Instructions to Bidders).

**RESPONSIVE BIDDER/OFFEROR:** An individual, company, firm, corporation, partnership or other organization having submitted a bid which conforms in all material respects to the invitation for bid or request for proposal.

**SERVICES:** Any work performed by an independent contractor wherein the service rendered does not consist primarily of acquisition of equipment or materials, or the rental of equipment, materials and supplies.

**SOLICITATION:** The process of notifying prospective bidders that the County wishes to receive bids on a set of requirements to provide goods or services. The notification of County requirements may consist of public advertising (newspaper, County Web Site, or other electronic notification), the mailing of Notices of Solicitation, Invitation for Bid (IFB) or Request for Proposal (RFP), the public posting of notices, issuance of an Open Market Procurement (OMP), or telephone calls to prospective bidders.

**STATE:** Commonwealth of Virginia.

### **CONDITIONS OF BIDDING**

**3. BID FORMS-**Unless otherwise specified in the solicitation, all bids shall be submitted on the forms provided, to include the bid Cover Sheet and Pricing Schedule(s), properly signed in ink in the proper spaces and submitted in a sealed envelope or package. The item pages of the Pricing Schedule which do not include any items for which a bid is required need not be included in the submission of a bid.

Should the bid prices and/or any other submissions differ on the copy of the submitted bid, the ORIGINAL copy shall prevail.

#### **4. LATE BIDS & MODIFICATIONS OF BIDS-**

- a. Any bid/modification received at the office designated in the solicitation after the exact time specified for receipt of the bid/modification is considered a late bid/modification. A late bid/modification will not be considered for award except under the following conditions only:
  1. It was sent by registered or certified mail not later than the fifth (5th) calendar date prior to the date specified for receipt of the bid/modification; or
  2. The bid/modification was sent by mail and it is determined by the County Purchasing Agent that the late receipt was due solely to mishandling by the County after receipt at the address specified in the solicitation.
- b. If an emergency or unanticipated event or closing interrupts or suspends normal County business operations so that bids cannot be received at the County office designated for receipt of bids by the exact time specified in the solicitation, the due date/time specified for receipt of bids will be deemed to be extended to the same time of day specified in the solicitation on the first work day on which normal County business operations resume.
- c. The official time used for receipt of bids/modifications is the Bid Clerk's time and date stamp clock located in the Department of Purchasing and Supply Management. All bidders are responsible for ensuring all bids/modifications are received prior to the scheduled due date/time.
- d. A late hand-carried bid, or any other late bid not submitted by mail, shall not be considered for award.

#### **5. WITHDRAWAL OF BIDS-**

- a. A bidder for a public construction contract, other than a contract for construction or maintenance of public highways, may withdraw his or her bid from consideration if the price bid was substantially lower than the other bids due solely to a mistake therein, provided the bid was submitted in good faith, and the mistake was a clerical mistake as opposed to a judgment mistake, and was actually due to an unintentional arithmetic error or an unintentional omission of a quantity of work, labor or material made directly in the compilation of a bid, which unintentional arithmetic error or unintentional omission can be clearly shown by objective evidence drawn from inspection of original work papers, documents and materials used in the preparation of the bid sought to be withdrawn. If a bid contains both clerical and judgment mistakes, a bidder may withdraw his bid from consideration if the price bid would have been substantially lower than the other bids due solely to the clerical mistake, that was an unintentional arithmetic error or an unintentional omission of a quantity of work, labor or material made directly in the compilation of a bid which shall be clearly shown by objective evidence drawn from inspection of original work papers, documents and materials used in the preparation of the bid sought to be withdrawn. The bidder shall give notice in writing to the Purchasing Agent of his or her claim of right to withdraw his or her bid within two (2) business days after the conclusion of the bid opening procedure and shall submit original work papers with such notice.



**General Conditions and Instructions to Bidders**

- b. A bidder for a contract other than for public construction may request withdrawal of his or her bid under the following circumstances:
    - 1. Requests for withdrawal of bids prior to opening of such bids shall be transmitted to the County Purchasing Agent in writing.
    - 2. Requests for withdrawal of bids after opening of such bids but prior to award shall be transmitted to the County Purchasing Agent, in writing, accompanied by full documentation supporting the request. If the request is based on a claim of error, documentation must show the basis of the error. Such documentation may take the form of supplier quotations, vendor work sheets, etc. If bid bonds were tendered with the bid, the County may exercise its right of collection.
  - c. No bid may be withdrawn under this paragraph when the result would be the awarding of the contract on another bid of the same bidder or of another bidder in which the ownership of the withdrawing bidder is more than five percent.
  - d. If a bid is withdrawn under the authority of this paragraph, the lowest remaining bid shall be deemed to be the low bid.
  - e. No bidder who is permitted to withdraw a bid shall, for compensation, supply any material or labor to or perform any subcontract or other work agreement for the person or firm to whom the contract is awarded or otherwise benefit, directly or indirectly, from the performance of the project for which the withdrawn bid was submitted.
  - f. If the county denies the withdrawal of a bid under the provisions of this paragraph, it shall notify the bidder in writing stating the reasons for its decision and award the contract to such bidder at the bid price, provided such bidder is a responsible and responsive bidder.
  - g. Work papers, documents, and materials submitted in support of a withdrawal of bids may be considered as trade secrets or proprietary information subject to the conditions of the Virginia Freedom of Information Act.
- 6. ERRORS IN BIDS**-When an error is made in extending total prices, the unit bid price will govern. Erasures in bids must be initialed by the bidder. Carelessness in quoting prices, or in preparation of bid otherwise, will not relieve the bidder. Bidders are cautioned to recheck their bids for possible error. Errors discovered after public opening cannot be corrected and the bidder will be required to perform if his or her bid is accepted.
- 7. MAILING OF BIDS** – All bids and proposals submitted in response to a Fairfax County solicitation shall be submitted in a sealed envelope or package identified with the solicitation number, title, bidder's name and address, and due date/time of opening/closing clearly marked on the outside of such envelope or package.
- 8. COMPLETENESS**-To be responsive, a bid must include all information required by the solicitation.
- 9. ACCEPTANCE OF BIDS/BINDING 90 DAYS**-Unless otherwise specified, all formal bids submitted shall be binding for ninety (90) calendar days following bid opening date, unless extended by mutual consent of all parties.
- 10. CONDITIONAL BIDS**-Conditional bids are subject to rejection in whole or in part.
- 11. BIDS FOR ALL OR PART**-Unless otherwise specified by the County Purchasing Agent or by the bidder, the Purchasing Agent reserves the right to make award on all items in the aggregate or on any of the items on an individual basis, whichever is in the best interest of the County. A bidder may restrict his or her bid to consideration in the aggregate by so stating but shall name a single unit price on each item bid. Any bid in which the bidder names a total price for all the articles without quoting a unit price for each and every separate item may not be considered for award.
- 12. AREA BIDS**-For the purchase and delivery of certain goods and services the County may be divided into Areas (e.g., Areas I, II, III, and IV). When such goods and services are included in the Pricing Schedule, bidders may bid on all areas or an individual area. A map showing the areas of the County will be furnished with the solicitation when required.
- 13. TIME FOR RECEIVING BID**-Bids received prior to the time of opening will be securely kept, unopened. The representative of the Purchasing Agent assigned to open them will decide when the specified time has arrived, and no bid received thereafter will be considered, except as provided in paragraph 4, General Conditions and Instructions to Bidders. No responsibility will attach to the Purchasing Agent or his or her representative for the premature opening of a bid not properly addressed and identified. Unless specifically authorized in the solicitation, telegraphic, electronic, or facsimile bids/modifications will not be considered.
- 14. BID OPENING**-All bids received in response to an Invitation for Bid (IFB) will be opened at the date, time and place specified, read publicly, and made available for inspection as provided in paragraph 68, General Conditions and Instructions to Bidders. Tabulations of bids received are posted on the Department of Purchasing & Supply Management Bulletin Board as well as the County's web site: <http://www.fairfaxcounty.gov/dpsm/bidtab.htm>. Proposals received in response to a Request for Proposal (RFP) will be made available as provided in paragraph 68, General Conditions and Instructions to Bidders.
- 15. OMISSIONS & DISCREPANCIES**-Any items or parts of any equipment listed in this solicitation which are not fully described or are omitted from such specification, and which are clearly necessary for the completion of such equipment and its appurtenances, shall be considered a part of such equipment although not directly specified or called for in the specifications.

Should a bidder find discrepancies or ambiguities in, or omissions from, the solicitation, including the drawings and/or specifications, he or she shall notify the Purchasing Agent at least five (5) days prior to the date set for the opening of bids. If necessary, the

**General Conditions and Instructions to Bidders**

Purchasing Agent will send a written addendum for clarification to all bidders no later than three (3) days before the date set for opening of bids. Notifications regarding specifications will not be considered if received within five days of the date set for opening of bids.

**16. RESPONSE TO SOLICITATIONS**-In the event a vendor cannot submit a bid on a solicitation, he or she is requested to return the solicitation cover sheet with an explanation as to why he or she is unable to bid on these requirements.

**17. BIDDER INTERESTED IN MORE THAN ONE BID**-If more than one bid is offered by any one party, either directly or by or in the name of his or her clerk, partner, or other persons, all such bids may be rejected. A party who has quoted prices on work, materials, or supplies to a bidder is not thereby disqualified from quoting prices to other bidders or firms submitting a bid directly for the work, materials or supplies.

**18. TAX EXEMPTION**-The County is exempt from the payment of any federal excise or any Virginia sales tax. The price bid must be net, exclusive of taxes. However, when under established trade practice any federal excise tax is included in the list price, a bidder may quote the list price and shall show separately the amount of federal tax, either as a flat sum or as a percentage of the list price, which shall be deducted by the County. Fairfax County's Federal Excise Tax Exemption Number is 54-74-0127K. Contractors located outside the Commonwealth of Virginia are advised that when materials are picked up by the County at their place of business, they may charge and collect their own local/state sales tax. Materials used in the performance of construction contracts are subject to Virginia Sales/Use Tax as described in Section 630-10-27J of the Virginia Retail Sales and Use Tax Regulations.

**19. PROHIBITION AGAINST UNIFORM PRICING**-The County Purchasing Agent shall encourage open and competitive bidding by all possible means and shall endeavor to obtain the maximum degree of open competition on all purchase transactions using the competitive sealed bidding, competitive negotiation, or open market methods of procurement. In submitting a bid each bidder shall, by virtue of submitting a bid, guarantee that he or she has not been a party with other bidders to an agreement to bid a fixed or uniform price. Violation of this implied guarantee shall render void the bids of participating bidders. Any disclosure to or acquisition by a competitive bidder, in advance of the opening of the bids, of the terms or conditions of the bid submitted by another competitor may render the entire proceedings void and may require re-advertising for bids.

**SPECIFICATIONS**

**20. QUESTIONS CONCERNING SPECIFICATIONS**-Any information relative to interpretation of specifications and drawings shall be requested of the Purchasing Agent, in writing, in ample time before the opening of bids. No inquiries, if received by the Purchasing Agent within five (5) days of the date set for the opening of bids, will be given any consideration. Any material interpretation of a specification, as determined by the County Purchasing Agent, will be expressed in the form of an addendum to the specification which will be sent to all prospective bidders no later than three (3) days before the date set for receipt of bids. Oral answers will not be authoritative.

**21. BRAND NAME OR EQUAL ITEMS**-Unless otherwise provided in the invitation for bid, the name of a certain brand, make or manufacturer does not restrict bidders to the specific brand, make or manufacturer named; it conveys the general style, type, character, and quality of the article desired, and any article which the County in its sole discretion determines to be the equal of that specified, considering quality, workmanship, economy of operation, and suitability for the purpose intended, shall be accepted.

**22. FORMAL SPECIFICATIONS**-When a solicitation contains a specification which states no substitutes, no deviation therefrom will be permitted and the bidder will be required to furnish articles in conformity with that specification.

The bidder shall abide by and comply with the true intent of the specifications and not take advantage of any unintentional error or omission, but shall fully complete every part as the true intent and meaning of the specifications and drawings. Whenever the mention is made of any articles, material, or workmanship to be in accordance with laws, ordinances, building codes, underwriter's codes, A.S.T.M. regulations or similar expressions, the requirements of these laws, ordinances, etc., shall be construed as to the minimum requirements of these specifications.

**23. FEDERAL SPECIFICATIONS**-Any Federal Specifications referred to herein may be obtained from the GSA Federal Supply Service Bureau - Specification Section, 470 East L'Enfant Plaza, S.W., Suite #8100, Washington, D.C. 20407 (Voice: 1-202-619-8925, Fax: 1-202-619-8978).

**AWARD**

**24. AWARD OR REJECTION OF BIDS**-The Purchasing Agent shall award the contract to the lowest responsive and responsible bidder complying with all provisions of the IFB, provided the bid price is reasonable and it is in the best interest of the County to accept it. Awards made in response to a RFP will be made to the highest qualified offeror whose proposal is determined, in writing, to be the most advantageous to the County taking into consideration the evaluation factors set forth in the RFP. The Purchasing Agent reserves the right to award a contract by individual items, in the aggregate, or in combination thereof, or to reject any or all bids and to waive any informality in bids received whenever such rejection or waiver is in the best interest of the County. Award may be made to as many bidders as deemed necessary to fulfill the anticipated requirements of Fairfax County. The Purchasing Agent also reserves the right to reject the bid of a bidder deemed to be a non-responsible bidder.

In determining the responsibility of a bidder, the following criteria will be considered:

- a. The ability, capacity and skill of the bidder to perform the contract or provide the service required;
- b. Whether the bidder can perform the contract or provide the service promptly, or within the time specified, without delay or interference;
- c. The character, integrity, reputation, judgment, experience and efficiency of the bidder;
- d. The quality of performance of previous contracts or services;

**General Conditions and Instructions to Bidders**

- e. The previous and existing compliance by the bidder with laws and ordinances relating to the contract or services;
- f. The sufficiency of the financial resources and ability of the bidder to perform the contract or provide the service;
- g. The quality, availability and adaptability of the goods or services to the particular use required;
- h. The ability of the bidder to provide future maintenance and service for the use of the subject of the contract;
- i. The number and scope of the conditions attached to the bid;
- j. Whether the bidder is in arrears to the County on debt or contract or is a defaulter on surety to the County or whether the bidder's County taxes or assessments are delinquent; and
- k. Such other information as may be secured by the County Purchasing Agent having a bearing on the decision to award the contract. If an apparent low bidder is not awarded a contract for reasons of nonresponsibility, the County Purchasing Agent shall so notify that bidder and shall have recorded the reasons in the contract file.

**25. NOTICE OF ACCEPTANCE/CONTRACT DOCUMENTS-**A written award (or Acceptance Agreement) mailed (or otherwise furnished) to the successful bidder within the time for acceptance specified in the solicitation shall be deemed to result in a binding contract. The following documents which are included in the solicitation shall be incorporated by reference in the resulting contract and become a part of said contract:

- a. County of Fairfax Solicitation Form/Acceptance Agreement (Cover Sheet) and other documents which may be incorporated by reference, if applicable,
- b. General Conditions and Instructions to Bidders,
- c. Special Provisions and Specifications,
- d. Pricing Schedule,
- e. Any Addenda/Amendments/Memoranda of Negotiations

**26. TIE-BIDS** – If all bids are for the same total amount or unit price (including authorized discounts and delivery times), and if the public interest will not permit the delay of readvertisement for bids, the County Purchasing Agent is authorized to award the contract to the resident Fairfax County tie bidder whose firm has its principal place of business in the County, or if there be none, to the resident Virginia tie bidder, or if there be none, to one of the tie bidders by drawing lots in public; or the County Purchasing Agent may purchase the goods or services in the open market except that the price paid shall not exceed the lowest contract bid price submitted for the same goods or services. The decision of the County to make award to one or more such bidders shall be final.

**27. PROMPT PAYMENT DISCOUNT-**

- a. Unless otherwise specified in the solicitation, prompt payment discounts requiring payment in less than fifteen (15) days will not be considered in evaluating a bid for award. However, even though not considered in the evaluation, such discounts will be taken if payment is to be made within the discount period.
- b. In connection with any discount offered, time will be computed from the date of delivery of the supplies to the carrier when delivery, inspection and acceptance are at the point of origin; or, from date of delivery, inspection and acceptance at destination; or, from date correct invoice or voucher is received in the office specified by the County, if the latter is later than the date of acceptance. In the event the bidder does not indicate a prompt payment discount, it shall be construed to mean NET 30 days.

For the purpose of earning the discount, payment is deemed to be made as of the date of mailing of the County check or issuance of an Electronic Funds Transfer.

**28. INSPECTION-ACCEPTANCE-**For determining acceptance of supplies in accordance with the provisions of the prompt payment discount paragraph, inspection and acceptance shall be accomplished only after examination (including testing) of supplies and services to determine whether the supplies and services conform to the contract requirements. Acceptance shall occur only after receipt and inspection provided such inspection, as appropriate, is accomplished within a reasonable time.

**29. DEFINITE BID QUANTITIES-**Where definite quantities are specifically stated, acceptance will bind the County to order quantities specified and to pay for, at contract prices, all such supplies or services delivered that meet specifications and conditions of the contract. However, the County will not be required to accept delivery of any balances unordered, as of the contract expiration date, unless the Contractor furnished the Purchasing Agent with a statement of unordered balances not later than ten (10) days after the termination date of the contract.

**30. REQUIREMENT BID QUANTITIES-**On "Requirement" bids, acceptance will bind the County to pay for, at unit bid prices, only quantities ordered and delivered. Where the County specifies estimated quantities, the Contractor shall not be required to deliver more than ten (10) percent in excess of the estimated quantity of each item, unless otherwise agreed upon.

**CONTRACT PROVISIONS**

**31. TERMINATION OF CONTRACTS-**Contracts will remain in force for full periods specified and/or until all articles ordered before date of termination shall have been satisfactorily delivered and accepted and thereafter until all requirements and conditions shall have been met, unless:

- a. Terminated prior to expiration date by satisfactory deliveries of entire contract requirements, or upon termination by the County for Convenience or Cause.
- b. Extended upon written authorization of the Purchasing Agent and accepted by Contractor, to permit ordering of unordered balances or additional quantities at contract prices and in accordance with contract terms.

**32. TERMINATION FOR CONVENIENCE-**A contract may be terminated in whole or in part by the County in accordance with this clause whenever the County Purchasing Agent shall determine that such a termination is in the best interest of the County. Any such termination shall be effected by delivery to the Contractor at least five (5) working days prior to the termination date of a Notice of Termination specifying the extent to which performance shall be terminated and the date upon which termination becomes

**General Conditions and Instructions to Bidders**

effective. An equitable adjustment in the contract price shall be made for completed service, but no amount shall be allowed for anticipated profit on unperformed services.

**33. TERMINATION OF CONTRACT FOR CAUSE-**

- a. If, through any cause, the Contractor shall fail to fulfill in a timely and proper manner his or her obligations under this contract, or if the Contractor violates any of the covenants, agreements, or stipulations of this contract, in addition to the County's remedies under the contract and all other rights available at law or in equity, the County shall have the right to immediately terminate this contract. Such termination shall be effected by delivering a notice of termination to the Contractor at any time specifying the effective date of such termination. In such event all finished or unfinished documents, data, studies, surveys, drawings, maps, models, and reports prepared by the Contractor under the contract shall, at the option of the County, become its property and the Contractor shall be entitled to receive just and equitable compensation for any satisfactory work completed on such documents.
- b. Notwithstanding the above, the Contractor shall not be relieved of liability to the County for damages sustained by the County by virtue of any breach of contract by the Contractor for the purpose of set off until such time as the exact amount of damages due to the County from the Contractor is determined.

**34. CONTRACT ALTERATIONS-**No alterations in the terms of a contract shall be valid or binding upon the County unless made in writing and signed by the Purchasing Agent or his or her authorized agent.

**35. SUBLETTING OF CONTRACT OR ASSIGNMENT OF CONTRACT FUNDS-**It is mutually understood and agreed that the Contractor shall not assign, transfer, convey, sublet or otherwise dispose of his or her contractual duties to any other person, firm or corporation, without the previous written consent of the Purchasing Agent. If the Contractor desires to assign his or her right to payment of the contract, Contractor shall notify the Purchasing Agent immediately, in writing, of such assignment of right to payment. In no case shall such assignment of contract relieve the Contractor from his or her obligations or change the terms of the contract.

**36. FUNDING-**A contract shall be deemed binding only to the extent of appropriations available to each Agency for the purchase of goods and services.

**37. DELIVERY/SERVICE FAILURES-**Failure of a Contractor to deliver goods or services within the time specified, or within reasonable time as interpreted by the Purchasing Agent, or failure to make replacements/corrections of rejected articles/services when so requested, immediately or as directed by the Purchasing Agent, shall constitute authority for the Purchasing Agent to purchase in the open market articles/services of comparable grade/quality to replace the services, articles rejected, and/or not delivered. On all such purchases, the Contractor shall reimburse the County, within a reasonable time specified by the Purchasing Agent, for any expense incurred in excess of contract prices. Such purchases shall be deducted from the contract quantities if applicable. Should public necessity demand it, the County reserves the right to use or consume articles delivered or services performed which are substandard in quality, subject to an adjustment in price to be determined by the Purchasing Agent.

**38. NON-LIABILITY-**The Contractor shall not be liable in damages for delay in shipment or failure to deliver when such delay or failure is the result of fire, flood, strike, the transportation carrier, act of God, act of Government, act of an alien enemy or by any other circumstances which, in the Purchasing Agent's opinion, are beyond the control of the Contractor. Under such circumstances, however, the Purchasing Agent may, at his or her discretion, cancel the contract.

**39. NEW GOODS, FRESH STOCK-**All Contractors, unless otherwise specifically stated, shall provide new commodities, fresh stock, latest model, design or pack.

**40. NON-DISCRIMINATION-**During the performance of this contract, the Contractor agrees as follows:

- a. The Contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, or other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Contractor. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause.
- b. The Contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such Contractor is an equal opportunity employer.
- c. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.
- d. The Contractor will include the provisions of the foregoing paragraphs a, b, and c above in every subcontract or purchase order of over \$10,000 so that the provisions will be binding upon each subcontractor or vendor.
- e. Contractor and Subcontractor hereunder shall, throughout the term of this contract, comply with the Human Rights Ordinance, Chapter 11 of the Code of the County of Fairfax, Virginia, as reenacted or amended.

**41. SMALL AND MINORITY BUSINESS UTILIZATION**

- a. It is the policy of the County of Fairfax as declared by the Fairfax County Board of Supervisors' adoption of a Small and Minority Business Enterprise Program, April 6, 1981, that Fairfax County and its employees undertake every effort to increase opportunity for utilization of small or minority businesses in all aspects of procurement to the maximum extent feasible.
- b. Where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such subcontracting opportunities to small, women and minority businesses.

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- c. Where Federal grants or monies are involved it is the policy of Fairfax County, through its agents and employees, to comply with the requirements set forth in the U.S. Office of Management and Budget Circular No. A-102, uniform administrative requirements for Grants and Cooperative Agreements with State and Local Governments, as they pertain to small and minority business utilization.

**42. GUARANTEES & WARRANTIES**-All guarantees and warranties required shall be furnished by the Contractor and shall be delivered to the Purchasing Agent before final payment on the contract is made. Unless otherwise stated, manufacturer's standard warranty applies.

**43. PRICE REDUCTION**-If at any time after the date of the bid the Contractor makes a general price reduction in the comparable price of any material covered by the contract to customers generally, an equivalent price reduction based on similar quantities and/or considerations shall apply to this contract for the duration of the contract period (or until the price is further reduced). Such price reduction shall be effective at the same time and in the same manner as the reduction in the price to customers generally. For purpose of this provision, a "general price reduction" shall mean any horizontal reduction in the price of an article or service offered (1) to Contractor's customers generally, or (2) in the Contractor's price schedule for the class of customers, i.e., wholesalers, jobbers, retailers, etc., which was used as the basis for bidding on this solicitation. An occasional sale at a lower price, or sale of distressed merchandise at a lower price, would not be considered a "general price reduction" under this provision. The Contractor shall submit his or her invoice at such reduced prices indicating on the invoice that the reduction is pursuant to the "Price Reduction" provision of the contract documents. The Contractor in addition will within ten days of any general price reduction notify the Purchasing Agent of such reduction by letter. **FAILURE TO DO SO MAY REQUIRE TERMINATION OF THE CONTRACT.** Upon receipt of any such notice of a general price reduction, all ordering offices will be duly notified by the Purchasing Agent.

The Contractor, if requested, shall furnish, within ten days after the end of the contract period, a statement certifying either (1) that no general price reduction, as defined above, was made after the date of the bid, or (2) if any such general price reductions were made, that as provided above, they were reported to the Purchasing Agent within ten (10) days and ordering offices were billed at the reduced prices. Where one or more such general price reductions were made, the statement furnished by the Contractor shall include with respect to each price reduction (1) the date when notice of any such reduction was issued, (2) the effective date of the reduction, and (3) the date when the Purchasing Agent was notified of any such reduction.

**44. CHANGES**-Should it become proper or necessary in the execution of this contract to make any change in design, or to make any alterations which will increase the expense, the Purchasing Agent shall determine an equitable adjustment. No payment shall be made to the Contractor for any extra material or services, or of any greater amount of money than stipulated to be paid in the contract, unless some changes in or additions to the contract requiring additional outlay by the Contractor shall first have been expressly authorized and ordered in writing by contract amendment or otherwise furnished by the Purchasing Agent.

**45. PLACING OF ORDERS**-Orders against contracts will be placed with the Contractor on a Purchase Order (or Procurement Card) executed and released by the Purchasing Agent or his or her designee. The Purchase Order must bear the appropriate contract number and date. Where Blanket Purchase Agreements (BPAs) have been executed and a Blanket Purchase Order has been released by the Purchasing Agent, telephonic orders may be placed directly with the Contractor by authorized personnel in the ordering Agency.

**DELIVERY PROVISIONS**

**46. SHIPPING INSTRUCTIONS - CONSIGNMENT**-Unless otherwise specified in the solicitation each case, crate, barrel, package, etc., delivered under the contract must be plainly stenciled or securely tagged, stating the Contractor's name, purchase order number, and delivery address as indicated in the order. Where shipping containers are to be used, each container must be marked with the purchase order number, name of the Contractor, the name of the item, the item number, and the quantity contained therein. Deliveries must be made within the hours of 8:00 AM - 3:00 PM. Deliveries at any other time will not be accepted unless specific arrangements have been previously made with the receiver at the delivery point. No deliveries will be accepted on Saturdays, Sundays and holidays, unless previous arrangements have been made. It shall be the responsibility of the Contractor to insure compliance with these instructions for items that are drop-shipped.

**47. RESPONSIBILITY FOR SUPPLIES TENDERED**-Unless otherwise specified in the solicitation, the Contractor shall be responsible for the materials or supplies covered by the contract until they are delivered at the designated point, but the Contractor shall bear all risk on rejected materials or supplies after notice of rejection. Rejected materials or supplies must be removed by and at the expense of the Contractor promptly after notification of rejection, unless public health and safety require immediate destruction or other disposal of rejected delivery. If rejected materials are not removed by the Contractor within ten (10) days after date of notification, the County may return the rejected materials or supplies to the Contractor at his or her risk and expense or dispose of them as its own property.

**48. INSPECTIONS**-Inspection and acceptance of materials or supplies will be made after delivery at destinations herein specified unless otherwise stated. If inspection is made after delivery at destination herein specified, the County will bear the expense of inspection except for the value of samples used in case of rejection. Final inspection shall be conclusive except in regard to latent defects, fraud or such gross mistakes as to amount to fraud. Final inspection and acceptance or rejection of the materials or supplies will be made as promptly as practicable, but failure to inspect and accept or reject materials or supplies shall not impose liability on the County for such materials or supplies as are not in accordance with the specifications.

**49. COMPLIANCE**-Delivery must be made as ordered and in accordance with the solicitation or as directed by the Purchasing Agent when not in conflict with the bid. The decision of the Purchasing Agent as to reasonable compliance with delivery terms shall be final. Burden of proof of delay in receipt of goods by the purchaser shall rest with the Contractor. Any request for extension of time of delivery from that specified must be approved by the Purchasing Agent, such extension applying only to the particular item or shipment affected. Should the Contractor be delayed by the County, there shall be added to the time of completion a time equal to the period of such delay caused by the County. However, the contractor shall not be entitled to claim damages or extra compensation for such delay or suspension. These conditions may vary for construction contracts. See Special Provisions for the

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individual solicitation.

**50. POINT OF DESTINATION**-All materials shipped to the County must be shipped F.O.B. DESTINATION unless otherwise stated in the contract or purchase order. The materials must be delivered to the "Ship to" address indicated on the purchase order.

**51. ADDITIONAL CHARGES**-Unless bought F.O.B. "shipping point" and Contractor prepays transportation, no delivery charges shall be added to invoices except when express delivery is authorized and substituted on orders for the method specified in the contract. In such cases, difference between freight or mail and express charges may be added to invoice.

**52. METHOD AND CONTAINERS**-Unless otherwise specified, goods shall be delivered in commercial packages in standard commercial containers, so constructed as to ensure acceptance by common or other carrier for safe transportation to the point of delivery. Containers become the property of the County unless otherwise specified by bidder.

**53. WEIGHT CHECKING**-Deliveries shall be subject to re-weighing over official sealed scales designated by the County. Payments shall be made on the basis of net weight of materials delivered. Normal shrinkage may be allowed in such instances where shrinkage is possible. Net weights only, exclusive of containers or wrapping, shall be paid for by the County.

**54. DEMURRAGE AND RE-SPOTTING**-The County will be responsible for demurrage charges only when such charges accrue because of the County's negligence in unloading the materials. The County will pay railroad charges due to the re-spotting of cars, only when such re-spotting is ordered by the County.

**55. REPLACEMENT**-Materials or components that have been rejected by the Purchasing Agent, in accordance with the terms of a contract, shall be replaced by the Contractor at no cost to the County.

**56. PACKING SLIPS OR DELIVERY TICKETS**-All shipments shall be accompanied by Packing Slips or Delivery Tickets and shall contain the following information for each item delivered:

1. The Purchase Order Number,
2. The Name of the Article and Stock Number (Supplier's),
3. The Fairfax County Identification Number (FCIN), if specified in the order,
4. The Quantity Ordered,
5. The Quantity Shipped,
6. The Quantity Back Ordered,
7. The Name of the Contractor.

Contractors are cautioned that failure to comply with these conditions shall be considered sufficient reason for refusal to accept the goods.

**BILLING**

**57. BILLING**-Billing for the Fairfax County Public Schools and for County agencies: Unless otherwise specified on the contract or purchase order (PO), invoices are to be submitted, in DUPLICATE, for each purchase order immediately upon completion of the shipment or services. If shipment is made by freight or express, the original Bill of Lading, properly receipted, must be attached to the invoice. Invoices should be mailed to the "BILL TO" address on the PO or to the appropriate address specified in the contract.

**PAYMENTS**

**58. PAYMENT**-Payment shall be made after satisfactory performance of the contract, in accordance with all of the provisions thereof, and upon receipt of a properly completed invoice. Fairfax County reserves the right to withhold any or all payments or portions thereof for Contractor's failure to perform in accordance with the provision of the contract or any modifications thereto.

**59. PARTIAL PAYMENTS**-Unless otherwise specified, partial payments will be made upon acceptance of materials or services so invoiced if in accordance with completion date. However, up to 5 percent (5%) of the value of the entire order may be retained until completion of contract.

**60. PAYMENT FOR EQUIPMENT, INSTALLATION, AND TESTING**-When equipment requires installation (which shall also be interpreted to mean erection and/or setting up or placing in position, service, or use) and test, and where such installation or testing is delayed, payment may be made on the basis of 50% of the contract price when such equipment is delivered on the site. A further allowance of 25% may be made when the equipment is installed and ready for test. The balance shall be paid after the equipment is tested and found to be satisfactory. If the equipment must be tested, but installation is not required to be made by the Contractor or if the equipment must be installed but testing is not required, payment may be made on the basis of 75% at the time of delivery and the balance shall be paid after satisfactory test or installation is completed.

**GENERAL**

**61. GENERAL GUARANTY**-Contractor agrees to:

- a. Save the County, its agents and employees harmless from liability of any nature or kind for the use of any copyrighted or uncopyrighted composition; secret process, patented or unpatented; invention; article or appliance furnished or used in the performance of a contract for which the Contractor is not the patentee, assignee, licensee or owner.
- b. Protect the County against latent defective material or workmanship and to repair or replace any damages or marring occasioned in transit or delivery.

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- c. Furnish adequate protection against damage to all work and to repair damages of any kind to the building or equipment, to his or her own work or to the work of other contractors, for which his or her workers are responsible.
- d. Pay for all permits, licenses and fees and give all notices and comply with all laws, ordinances, rules and regulations of the County.
- e. Protect the County from loss or damage to County owned property while it is in the custody of the Contractor.

**62. SERVICE CONTRACT GUARANTY-Contractor agrees to:**

- a. Furnish services described in the solicitation and resultant contract at the times and places and in the manner and subject to conditions therein set forth provided that the County may reduce the said services at any time.
- b. Enter upon the performance of services with all due diligence and dispatch, assiduously press to its complete performance, and exercise therein the highest degree of skill and competence.
- c. All work and services rendered in strict conformance to all laws, statutes, and ordinances and the applicable rules, regulations, methods and procedures of all government boards, bureaus, offices and other agents.
- d. Allow services to be inspected or reviewed by an employee of the County at any reasonable time and place selected by the County. Fairfax County shall be under no obligation to compensate Contractor for any services not rendered in strict conformity with the contract.
- e. Stipulate that the presence of a County Inspector shall not lessen the obligation of the Contractor for performance in accordance with the contract requirements, or be deemed a defense on the part of the Contractor for infraction thereof. The Inspector is not authorized to revoke, alter, enlarge, relax, or release any of the requirements of the contract documents. Any omission or failure on the part of the Inspector to disapprove or reject any work or material shall not be construed to be an acceptance of any such defective work or material. Notification of an omission or failure will be documented by the Purchasing Agent.

**63. INDEMNIFICATION-**Contractor shall indemnify, keep and save harmless the County, its agents, officials, employees and volunteers against claims of injuries, death, damage to property, theft, patent claims, suits, liabilities, judgments, cost and expenses which may otherwise accrue against the County in consequence of the granting of a contract or which may otherwise result therefrom, if it shall be determined that the act was caused through negligence or error, or omission of the Contractor or his or her employees, or that of the subcontractor or his or her employees, if any; and the Contractor shall, at his or her own expense, appear, defend and pay all charges of attorneys and all costs and other expenses arising therefrom or incurred in connection therewith; and if any judgment shall be rendered against the County in any such action, the Contractor shall, at his or her own expense, satisfy and discharge the same. Contractor expressly understands and agrees that any performance bond or insurance protection required by this contract, or otherwise provided by the Contractor, shall in no way limit the responsibility to indemnify, keep and save harmless and defend the County as herein provided.

**64. OFFICIALS NOT TO BENEFIT-**

- a. Each bidder or offeror shall certify, upon signing a bid or proposal, that to the best of his or her knowledge no Fairfax County official or employee having official responsibility for the procurement transaction, or member of his or her immediate family, has received or will receive any financial benefit of more than nominal or minimal value relating to the award of this contract. If such a benefit has been received or will be received, this fact shall be disclosed with the bid or proposal or as soon thereafter as it appears that such a benefit will be received. Failure to disclose the information prescribed above may result in suspension or debarment, or rescission of the contract made, or could affect payment pursuant to the terms of the contract.
- b. Whenever there is reason to believe that a financial benefit of the sort described in paragraph "a" has been or will be received in connection with a bid, proposal or contract, and that the contractor has failed to disclose such benefit or has inadequately disclosed it, the County Executive, as a prerequisite to payment pursuant to the contract, or at any other time, may require the Contractor to furnish, under oath, answers to any interrogatories related to such possible benefit.
- c. In the event the bidder or offeror has knowledge of benefits as outlined above, this information should be submitted with the bid or proposal. If the above does not apply at time of award of contract and becomes known after inception of a contract, the bidder or offeror shall address the disclosure of such facts to the Fairfax County Purchasing Agent, 12000 Government Center Parkway, Suite 427, Fairfax, Virginia 22035-0013. Relevant Invitation/Request for Proposal Number (see cover sheet) should be referenced in the disclosure.

**65. LICENSE REQUIREMENT-**All firms doing business in Fairfax County, shall obtain a license as required by Chapter 4, Article 7, of The Code of the County of Fairfax, Virginia, as amended, entitled "Business, Professional and Occupational Licensing (BPOL) Tax." Questions concerning the BPOL Tax should be directed to the Department of Tax Administration, telephone (703) 222-8234 or visit: [http://www.fairfaxcounty.gov/dta/business\\_tax.htm](http://www.fairfaxcounty.gov/dta/business_tax.htm). The BPOL Tax number must be indicated in the space provided on the Cover Sheet, "Fairfax License Tax No." when appropriate.

**66. AUTHORIZATION TO CONDUCT BUSINESS IN THE COMMONWEALTH:**A contractor organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the *Code of Virginia* or as otherwise required by law. Any business entity described above that enters into a contract with a Fairfax County pursuant to the Fairfax County Purchasing Resolution shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract. Fairfax County may void any contract with a business entity if the business entity fails to remain in compliance with the provisions of this section.

**67. COVENANT AGAINST CONTINGENT FEES-**The Contractor warrants that no person or selling agency has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except bona fide employees or bona fide established commercial or selling agencies maintained by the Contractor for the purpose of securing business. For violation of this warranty, the County shall have the right to terminate or suspend this contract without liability to the County or in its discretion to deduct from the contract price or consideration, or otherwise recover, the

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full amount of such commission, percentage, brokerage, or contingent fee.

**68. VIRGINIA FREEDOM OF INFORMATION ACT-**All proceedings, records, contracts and other public records relating to procurement transactions shall be open to the inspection of any citizen, or any interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act (Reference Section 4.D., of the Fairfax County Purchasing Resolution)

**BIDDER/CONTRACTOR REMEDIES****69. INELIGIBILITY-**

- a. Any person or firm suspended or debarred from participation in County procurement shall be notified in writing by the County Purchasing Agent.
  1. The Notice of Suspension shall state the reasons for the actions taken and such decision shall be final unless the person or firm appeals within thirty (30) days of receipt of the Notice by instituting legal action as provided in the Code of Virginia.
  2. The Notice of Debarment shall state the reasons for the actions taken and the decision shall be final unless the person or firm appeals within thirty (30) days of receipt of the notice by instituting legal action as provided in the Code of Virginia.
- b. The County Purchasing Agent shall have the authority to suspend or debar a person or firm from bidding on any contract for the causes stated below:
  1. Conviction for commission of a criminal offense as an incident to obtaining or attempting to obtain a public or private contract or subcontract, or in the performance of such contract or subcontract;
  2. Conviction under state or federal statutes of embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property, or any other offense indicating a lack of business integrity or business honesty which currently, seriously, and directly affects responsibility as a County contractor;
  3. Conviction under the state or federal antitrust statutes arising out of the submission of bids or proposals;
  4. Violation of contract provisions, as set forth below, of a character which is regarded by the County Purchasing Agent to be so serious as to justify suspension or debarment action:
    - (a) failure without good cause to perform in accordance with the specifications or within the time limit provided in the contract; or
    - (b) a recent record of failure to perform or of unsatisfactory performance in accordance with the terms of one or more contracts; provided, that failure to perform or unsatisfactory performance caused by acts beyond the control of the contractor shall not be considered to be a basis for suspension or debarment;
  5. Any other cause the County Purchasing Agent determines to be so serious and compelling as to affect responsibility as a contractor, such as debarment by another governmental entity for any cause listed herein, or because of prior reprimands;
  6. The contractor has abandoned performance or been terminated for default on any other Fairfax County project;
  7. The contractor is in default on any surety bond or written guarantee on which Fairfax County is an obligee.
- c. If, upon appeal, it is determined that the action taken by the County Purchasing Agent was arbitrary or capricious, or not in accordance with the Constitution of Virginia, statutes or regulations, the sole relief available to the person or firm shall be restoration of eligibility. The person or firm may not institute legal action until all statutory requirements have been met.

**70. APPEAL OF DENIAL OF WITHDRAWAL OF BID-**

- a. A decision denying withdrawal of a bid submitted by a bidder or offeror shall be final and conclusive unless the bidder appeals the decision within ten (10) days after receipt of the decision by instituting legal action as provided in the Code of Virginia. The bidder or offeror may not institute legal action until all statutory requirements have been met.
- b. If no bid bond was posted, a bidder refused withdrawal of bid under the provisions of Article 2, Section 4 a.9, of the Fairfax County Purchasing Resolution, prior to appealing, shall deliver to the County a certified check or cash bond in the amount of the difference between the bid sought to be withdrawn and the next low bid. Such security shall be released only upon a final determination that the bidder was entitled to withdraw the bid.
- c. If, upon appeal, it is determined that the decision refusing withdrawal of the bid was arbitrary or capricious, the sole relief shall be withdrawal of the bid.

**71. APPEAL OF DETERMINATION OF NONRESPONSIBILITY-**

- a. Any bidder who, despite being the apparent low bidder, is determined not to be a responsible bidder for a particular County contract shall be notified in writing by the County Purchasing Agent. Such notice shall state the basis for the determination, which shall be final unless the bidder appeals the decision within ten (10) days of receipt of the notice by instituting legal action as provided in the Code of Virginia. The bidder may not institute legal action until all statutory requirements have been met.
- b. If, upon appeal, it is determined that the decision of the County Purchasing Agent was arbitrary or capricious and the award for the particular County contract in question has not been made, the sole relief available to the bidder shall be a finding that the bidder is a responsible bidder for the County contract in question. Where the award has been made and performance has begun, the County may declare the contract void upon a finding that this action is in the best interest of the public. Where a contract is declared void, the performing contractor shall be compensated for the cost of performance up to the time of such declaration. In no event shall the performing contractor be entitled to lost profits.



**General Conditions and Instructions to Bidders****72. PROTEST OF AWARD OR DECISION TO AWARD-**

- a. Any bidder or offeror may protest the award or decision to award a contract by submitting a protest in writing to the County Purchasing Agent, or an official designated by the County of Fairfax, no later than ten (10) days after the award or the announcement of the decision to award, whichever occurs first. Any potential bidder or offeror on a contract negotiated on a sole source or emergency basis who desires to protest the award or decision to award such contract shall submit such protest in the same manner no later than ten days after posting or publication of the notice of such contract as provided in Article 3, Section 4, of the Fairfax County Purchasing Resolution. However, if the protest of any actual or potential bidder or offeror depends in whole or in part upon information contained in public records pertaining to the procurement transaction which are subject to inspection under Article 2, Section 4d of the Fairfax County Purchasing Resolution, then the time within which the protest must be submitted shall expire ten days after those records are available for inspection by such bidder or offeror under Article 2, Section 4d, or at such later time as provided herein. No protest shall lie for a claim that the selected bidder or offeror is not a responsible bidder or offeror. The written protest shall include the basis for the protest and the relief sought. The County Purchasing Agent shall issue a decision in writing within ten (10) days of the receipt of the protest stating the reasons for the action taken. This decision shall be final unless the bidder or offeror appeals within ten (10) days of receipt of the written decision by instituting legal action as provided in the Code of Virginia.
- b. If prior to award it is determined that the decision to award is arbitrary or capricious, then the sole relief shall be a finding to that effect. The County Purchasing Agent shall cancel the proposed award or revise it to comply with the law. If, after an award, it is determined that an award of a contract was arbitrary or capricious, then the sole relief shall be as hereinafter provided. Where the award has been made but performance has not begun, the performance of the contract may be declared void by the County. Where the award has been made and performance has begun, the County Purchasing Agent may declare the contract void upon a finding that this action is in the best interest of the County. Where a contract is declared void, the performing contractor shall be compensated for the cost of performance at the rate specified in the contract up to the time of such declaration. In no event shall the performing contractor be entitled to lost profits.
- c. Pending final determination of a protest or appeal, the validity of a contract awarded and accepted in good faith in accordance with this article shall not be affected by the fact that a protest or appeal has been filed.
- d. An award need not be delayed for the period allowed a bidder or offeror to protest, but in the event of a timely protest, no further action to award the contract will be taken unless there is a written determination that proceeding without delay is necessary to protect the public interest or unless the bid or offer would expire.

**73. CONTRACTUAL DISPUTES-**

- a. Any dispute concerning a question of fact as a result of a contract with the County which is not disposed of by agreement shall be decided by the County Purchasing Agent, who shall reduce his decision to writing and mail or otherwise forward a copy to the contractor within ninety (90) days. The decision of the County Purchasing Agent shall be final and conclusive unless the contractor appeals within six (6) months of the date of the final written decision by instituting legal action as provided in the Code of Virginia. A contractor may not institute legal action, prior to receipt of the County's Purchasing Agent's decision on the claim, unless the County Purchasing Agent fails to render such decision within the time specified.
- b. Contractual claims, whether for money or other relief, shall be submitted in writing no later than sixty days after final payment; however, written notice of the contractor's intention to file such claim shall have been given at the time of the occurrence or beginning of the work upon which the claim is based. Nothing herein shall preclude a contract from requiring submission of an invoice for final payment within a certain time after completion and acceptance of the work or acceptance of the goods. Pendency of claims shall not delay payment of amounts agreed due in the final payment.

**74. LEGAL ACTION-**No bidder, offeror, potential bidder or offeror, or contractor shall institute any legal action until all statutory requirements have been met.

**75. COOPERATIVE PURCHASING-**The County may participate in, sponsor, conduct or administer a cooperative procurement agreement on behalf of or in conjunction with one or more other public bodies, or public agencies or institutions or localities of the several states, of the United States or its territories, or the District of Columbia, for the purpose of combining requirements to increase efficiency or reduce administrative expenses in any acquisition of goods and services. Except for contracts for professional services, a public body may purchase from another public body's contract even if it did not participate in the request for proposal (RFP) or invitation for bid (IFB), if the RFP or IFB specified that the procurement was being conducted on behalf of other public bodies. Nothing herein shall prohibit the assessment or payment by direct or indirect means of any administrative fee that will allow for participation in any such arrangement.

**76. PROFESSIONAL AFFILIATION-**The Department of Purchasing & Supply Management holds membership in the National Institute of Governmental Purchasing, Inc., a non-profit, educational and technical organization that includes among its goals and objectives the study, discussion, and recommendation of improvements in governmental purchasing and the interchange of ideas and experiences on local state, and national governmental purchasing problems.

**77. DRUG FREE WORKPLACE-**During the performance of a contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor. For the purposes of this section, "drug-free workplace" means a site for the performance of work done in conjunction with a specific contract awarded to a contractor in accordance with this section, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

**General Conditions and Instructions to Bidders**

**78. VENUE:** This contract and its terms, including, but not limited to, the parties' obligations under it, the performance due from each party under it, and the remedies available to each party for breach of it, shall be governed by, construed and interpreted in accordance with the laws of the Commonwealth of Virginia. Any jurisdiction's choice of law, conflict of laws, rules, or provisions, including those of the Commonwealth of Virginia, that would cause the application of any laws other than those of the Commonwealth of Virginia shall not apply. Any and all disputes, claims and causes of action arising out of or in connection with this contract or any performance hereunder, shall be brought in the applicable court of Fairfax County, Virginia, or in the United States District Court, Eastern District of Virginia, Alexandria Division.

**79. IMMIGRATION REFORM AND CONTROL ACT:** Contractor certifies that it does not, and shall not during the performance of the contract for goods and services in the Commonwealth, knowingly employ an unauthorized alien as defined in the Federal Immigration Reform and Control Act of 1986.

**80. CONTRACTOR NOT TO BENEFIT:** Contractor agrees that the goods and/or services provided to Fairfax County pursuant to this Agreement are for the benefit of Fairfax County and that Contractor shall not undertake any actions or efforts stemming from or related to this Agreement that shall inure to the detriment of Fairfax County. Any information provided to the Contractor for the performance of this Contract shall not be used for any other purpose without the written consent of the Purchasing Agent.

**APPROVED:**

/S/ David P. Bobzien  
**COUNTY ATTORNEY**

/S/ Cathy A. Muse  
**COUNTY PURCHASING AGENT**

**OFFEROR DATA SHEET**

NAME OF OFFEROR: \_\_\_\_\_

ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

E-MAIL ADDRESS: \_\_\_\_\_

Name and e-mail addresses of both service and fiscal representatives (Key Personnel) who would handle this account.

Service Representative: \_\_\_\_\_  
Telephone Number: (    ) \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

Fiscal Representative: \_\_\_\_\_  
Telephone Number: (    ) \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

Payment Address, if different from above:

\_\_\_\_\_  
\_\_\_\_\_

**VIRGINIA STATE CORPORATION COMMISSION (SCC)**  
**REGISTRATION INFORMATION**

The bidder:

☐ is a corporation or other business entity with the following SCC identification number:  
\_\_\_\_\_ **-OR-**

☐ is not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust **-OR-**

☐ is an out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become contracts, and not counting any incidental presence of the bidder in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the contracts by which such goods were sold and shipped into Virginia from bidder's out-of-state location) **-OR-**

☐ is an out-of-state business entity that is including with this bid/proposal an opinion of legal counsel which accurately and completely discloses the undersigned bidder's current contacts with Virginia and describes why those contacts do not constitute the transaction of business in Virginia within the meaning of § 13.1-757 or other similar provisions in Titles 13.1 or 50 of the Code of Virginia.

Please check the following box if you have not checked any of the foregoing options but currently have pending before the SCC an application for authority to transact business in the Commonwealth of Virginia and wish to be considered for a waiver to allow you to submit the SCC identification number after the due date for bids: ☐

**BUSINESS, PROFESSIONAL AND OCCUPATIONAL LICENSE**

All firms located or operating in Fairfax County must obtain a Business, Professional and Occupational License (BPOL) as required by Chapter 4, Article 7, of the Code of the County of Fairfax, Virginia. In order for the Department of Tax Administration to determine your BPOL requirement prior to contract award, it is necessary for you to provide the following information:

- If you currently have a Fairfax County business license, please submit a copy with your proposal.
- Do you have an office in:      Virginia                      ☐ Yes                      ☐ No  
   Fairfax County                      ☐ Yes                      ☐ No
- Date business began/will begin work in Fairfax County

A detailed description of the business activity that will take place in Fairfax County. If business is located outside of Fairfax County, give the percentage of work actually to be done in the County

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\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**Complete and return this form or a copy of your current Fairfax County Business License with your proposal.**

### **CERTIFICATION REGARDING DEBARMENT OR SUSPENSION**

In compliance with contracts and grants agreements applicable under the U.S. Federal Awards Program, the following certification is required by all offerors submitting a proposal in response to this Request for Proposal:

1. The Offeror certifies, to the best of its knowledge and belief, that neither the Offeror nor its Principals are suspended, debarred, proposed for debarment, or declared ineligible for the award of contracts from the United States federal government procurement or nonprocurement programs, or are listed in the *List of Parties Excluded from Federal Procurement and Nonprocurement Programs* issued by the General Services Administration.
2. "Principals," for the purposes of this certification, means officers, directors, owners, partners, and persons having primary management or supervisory responsibilities within a business entity (e.g., general manager, plant manager, head of a subsidiary, division, or business segment, and similar positions).
3. The Offeror shall provide immediate written notice to the Fairfax County Purchasing Agent if, at any time prior to award, the Offeror learns that this certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
4. This certification is a material representation of fact upon which reliance will be placed when making the award. If it is later determined that the Offeror rendered an erroneous certification, in addition to other remedies available to Fairfax County government, the Fairfax County Purchasing Agent may terminate the contract resulting from this solicitation for default.

**Printed Name of Representative:** \_\_\_\_\_

**Signature/Date:** \_\_\_\_\_/\_\_\_\_\_

**Company Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City/State/Zip:** \_\_\_\_\_

**SSN or TIN No:** \_\_\_\_\_

**Listing Of Local Public Bodies**

REFERENCE PARAGRAPH 29 OF THE SPECIAL PROVISIONS,"USE OF CONTRACTS BY OTHER PUBLIC BODIES." You may select those public bodies that this contract may be extended to; a "blank" will signify a "NO" response:

	Alexandria Public Schools, VA		Manassas Park, Virginia
	Alexandria Sanitation Authority		Maryland-National Capital Park & Planning Commission
	Alexandria, Virginia		Maryland Transit Administration
	Arlington County, Virginia		Metropolitan Washington Airports Authority
	Arlington Public Schools, Virginia		Metropolitan Washington Council of Governments
	Bladensburg, Maryland		Montgomery College
	Bowie, Maryland		Montgomery County, Maryland
	Charles County Public Schools, MD		Montgomery County Public Schools
	College Park, Maryland		Northern Virginia Community College
	Culpeper County, Virginia		Omni Ride
	District of Columbia		Potomac & Rappahannock Trans. Commission
	District of Columbia Courts		Prince George's County, Maryland
	District of Columbia Public Schools		Prince George's County Public Schools
	DC Water and Sewer Authority		Prince William County, Virginia
	Fairfax County Water Authority		Prince William County Public Schools, VA
	Fairfax, Virginia (City)		Prince William County Service Authority
	Falls Church, Virginia		Rockville, Maryland
	Fauquier County Government and Schools, Virginia		Spotsylvania County Schools, Virginia
	Frederick, Maryland		Stafford County, Virginia
	Frederick County Maryland		Takoma Park, Maryland
	Gaithersburg, Maryland		Upper Occoquan Sewage Authority
	Greenbelt, Maryland		Vienna, Virginia
	Herndon, Virginia		Virginia Railway Express
	Leesburg, Virginia		Washington Metropolitan Area Transit Authority
	Loudoun County, Virginia		Washington Suburban Sanitary Commission
	Loudoun County Public Schools		Winchester, Virginia
	Loudoun County Sanitation Authority		Winchester Public Schools
	Manassas, Virginia		
	Manassas City Public Schools, Virginia		

**Complete and return this form with your proposal.**

\_\_\_\_\_  
Vendor Name

## **BUSINESS CLASSIFICATION**

### **DEFINITIONS**

***Small Business*** – means a business, independently owned or operated by one or more individuals who are U.S. citizens or legal resident aliens, and together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years. One or more of the individual owners shall control both the management and daily business operations of the small business.

***Minority-Owned Business*** - means a business concern that is at least 51% owned by one or more minority individuals who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51% of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more minority individuals.

***Woman-Owned Business*** – means a business that is at least 51% owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51% of the equity ownership interest is owned by one or more women who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more women.

**YOU MUST CLASSIFY YOUR BUSINESS/ORGANIZATION BY MARKING THE APPROPRIATE BOXES ON THE COVER SHEET (DPSM32).** This designation is required of all business/organizations including publicly traded corporations, non-profits, sheltered work shops, government organizations, partnerships, sole proprietorships, etc.



**Certification Regarding Ethics in Public Contracting**

In submitting this bid or proposal, and signing below, Bidder/Offeror certifies the following in connection with a bid, proposal, or contract:

Check one:

☐

1. I have not given any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal or minimal value to any public employee or official have official responsibility for a procurement transaction.

☐

2. I have given a payment, loan, subscription, advance, deposit of money, services or anything of more than nominal or minimal value to a public employee or official have official responsibility for a procurement transaction, but I received consideration in substantially equal or greater value in exchange.

If 2 is selected, please complete the following:

Recipient: \_\_\_\_\_

Date of Gift: \_\_\_\_\_

Description of the gift and its value:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Description of the consideration received in exchange and its value:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Printed Name of Bidder/Offeror Representative: \_\_\_\_\_

Signature/Date: \_\_\_\_\_ / \_\_\_\_\_

Company Name: \_\_\_\_\_

Company Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

***This certification supplements but does not replace the requirements set forth in paragraph 64 (OFFICIALS NOT TO BENEFIT) of the General Conditions and Instructions to Bidders included in this solicitation.***



**COUNTY OF FAIRFAX**  
**DEPARTMENT OF PURCHASING & SUPPLY MANAGEMENT**  
**SMALL AND MINORITY BUSINESS ENTERPRISE PROGRAM**  
12000 Government Center Parkway, Suite 427  
Fairfax, Virginia 22035-0013

**Fax: 703-324-3228**

**SUBCONTRACTOR (S) NOTIFICATION FORM**

Contract Number/Title: \_\_\_\_\_

Prime Contractors Name: \_\_\_\_\_

Prime Contractor's Classification: \_\_\_\_\_

You are required to provide the County with names, addresses, anticipated dollar amount and small/minority classification of each first-tier subcontractor (ref. paragraph 28, Special Provisions). Please complete this form and return it with your submission.

**Please check here if you are not using a subcontractor:** \_\_\_\_\_

SUBCONTRACTOR(S) NAME	STREET ADDRESS	CITY	STATE	ZIP CODE	ANTICIPATED DOLLAR AMOUNT	VENDOR CLASSIFICATION

**Complete and return this form with your proposal.**

## APPLICATION FOR DISABILITY RETIREMENT



**VIRGINIA RETIREMENT SYSTEM**  
P.O. Box 2500 ♦ Richmond, Virginia 23218-2500  
Toll Free 1-888-VARETIR (827-3847)  
Fax 804-786-9718  
[www.varetire.org](http://www.varetire.org)

Clear Form

1. Social Security Number
2. Check One <input type="checkbox"/> Original Application <input type="checkbox"/> Revised Application

### PART A. MEMBER INFORMATION

3. Name (First, Middle Initial, Last)	
4. Address (Street, City, State and Zip+4)	
5. Are you a Virginia resident? <input type="checkbox"/> Yes <input type="checkbox"/> No	6. Are you a U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No
7. Marital Status <input type="checkbox"/> Never Married <input type="checkbox"/> Married or Separated <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced – Date of Divorce _____ <span style="float: right;">(mm/dd/yyyy)</span>	
8. Home Phone Number	9. Daytime Phone Number
10. Birth Date (mm/dd/yy)	11. Retirement Date (mm/01/yy)
12. Are you in the process of purchasing prior service or have you purchased prior service credit in the past? <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>	
13. Will you be purchasing service credit with a sick leave payment? ( <i>Irrevocable option</i> ) <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>	
14. Is your disability application for a cause compensable under the Workers' Compensation Act? <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span> (If yes, attach a copy of the accident report)	
15. Have you received Workers' Compensation benefits? <input type="checkbox"/> No <input type="checkbox"/> Yes (If yes, attach a copy of the decision/award notice)	
16. Have you applied for Social Security disability benefits? <input type="checkbox"/> No <input type="checkbox"/> Yes (If yes, attach a copy of the receipt/decision letter)	
17. Have you previously applied for disability retirement? <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span> If yes, date applied: _____	
18. Will you be terminating all full-time employment with employers participating in VRS as of the earlier of your retirement date or upon approval of your disability retirement? ( <i>See instructions for more information</i> ) <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>	
19. Will you be terminating all part-time employment with the employer from which you are retiring as of the earlier of your retirement date or upon approval of your disability retirement? ( <i>See instructions for more information</i> ) <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A</span>	

VRS-6 (Rev. 10/15)



20. SSN

**PART B. PAYOUT OPTION SELECTION**

**21. Retirement Payout Options** (Choose One)

- ☐ Basic Benefit  
☐ Survivor Option with \_\_\_\_\_ % payable to my survivor

**PART C. SURVIVOR INFORMATION**

Complete Part C **ONLY** if you chose a Survivor Option in Part B. Your survivor is the person to whom your monthly retirement benefit will continue upon your death. (This is different than naming a beneficiary, which you do on the VRS-2.)

**22. Survivor's Name** (First, Middle Initial, Last)

**23. Relationship**

- ☐ Spouse ☐ Other

**24. Survivor's Birth Date** (mm/dd/yy)

**25. Survivor's SSN**

**26. Is your survivor a U.S. Citizen?**

- ☐ Yes ☐ No

**27. Survivor's Gender**

- ☐ Male ☐ Female

**PART D. CERTIFICATION**

**28. Member Certification**

I hereby certify all information I provide in this document is true and I understand that any willful falsification of facts presented may result in prosecution as provided by law. I agree that, in the event that VRS pays retirement benefits in excess of those to which I am entitled, I or my estate will repay the excess to VRS. By signing this form, I hereby assign to VRS any VRS group life insurance benefits that may be payable as a result of my death to secure repayment of any such retirement benefit overpayment.

Member Signature \_\_\_\_\_

\_\_\_\_\_ Date

**29. Spouse Certification** (Required if married or separated)

I have read and understand the retirement payout options available under VRS. I am aware of and understand the retirement payout option selected by my spouse in Part B and if my spouse chose a Survivor Option, the survivor benefits will be provided to the person named in Part C. Further, I am aware that counseling regarding the payout options is available.

Spouse's Signature \_\_\_\_\_

\_\_\_\_\_ Date

Address (If different from member's address) \_\_\_\_\_

**PART E. EMPLOYER CERTIFICATION** (Include a copy of the member's formal job description with this application.)

1. Member Name	2. Member Social Security Number
3. Member covered under: (Check One) <input type="checkbox"/> VRS <input type="checkbox"/> SPORS <input type="checkbox"/> JRS <input type="checkbox"/> VRS with Enhanced Benefits for Hazardous Duty Positions <input type="checkbox"/> VaLORS	
4. If applicable, select job name for member who may be eligible for the state health insurance credit: <input type="checkbox"/> Elected constitutional officer (Treasurer, Commissioner of Revenue, Clerk of Circuit Court, Commonwealth's Attorney, Sheriff) or an employee of an elected constitutional officer <input type="checkbox"/> General registrar or employee of a general registrar <input type="checkbox"/> Local social service board employee	
5. If applicable, select one for member covered by hazardous duty provisions: <input type="checkbox"/> Sworn officer of a regional jail <input type="checkbox"/> Disabled member in a non-hazardous position who retains benefits under the VRS with Enhanced Benefits <input type="checkbox"/> A uniformed officer in a hazardous duty position. This information is needed in order to comply with IRS requirements regarding maximum benefits (IRC 415 limits). Position held: _____ From: _____ To: _____	
6. Is this disability application for a cause compensable under Workers' Compensation? <span style="float: right;"><input type="checkbox"/> Yes    <input type="checkbox"/> No</span>	
7. Is the member receiving Workers' Compensation benefits? <span style="float: right;"><input type="checkbox"/> Yes    <input type="checkbox"/> No</span> If no, and the member is applying for work-related disability, the member must submit a written explanation from the Workers' Compensation Commission explaining why he or she is not eligible for workers' compensation.	
8. Last month the member's creditable compensation will be reported to VRS (mm/yyyy):	
9. Last monthly creditable compensation amount to be reported to VRS for retirement: \$ _____ NOTE: For educational employees, break down the amount to show the regular monthly creditable compensation and any pay up. (Monthly: \$ _____ + Pay-up: \$ _____ = Total of \$ _____)	
10. Last retirement contribution to be submitted (representing only 5 percent of #8 above): \$ _____	
11. Last annual salary rate (reported for group life insurance purposes): \$ _____	
12. Date last annual salary rate became effective (mm/dd/yyyy):	
13. Is the member currently on leave of absence without pay? <input type="checkbox"/> Yes <input type="checkbox"/> No    If yes, date leave began: _____ Is the leave of absence for active military duty? <input type="checkbox"/> Yes <input type="checkbox"/> No	
14. (State employees only) Is this member currently on leave share? <span style="float: right;"><input type="checkbox"/> Yes    <input type="checkbox"/> No</span> If no, do you anticipate the member will be on leave share in the future? <span style="float: right;"><input type="checkbox"/> Yes    <input type="checkbox"/> No</span>	
15. Is this member still actively employed? <span style="float: right;"><input type="checkbox"/> Yes    <input type="checkbox"/> No</span> Enter the member's date of termination (mm/dd/yyyy): _____ Complete the VRS-6D based on the work the member most recently performed and submit the form with this application.	
16. Employer Name and Address (Please print or type)	17. Employer Code
18. Authorized Human Resources Signature	19. Authorized Payroll Signature
Date	Date
20. Contact Information (Print the contact information for the person to whom VRS should direct questions regarding this application.)	
Name	E-mail Address
Phone Number	



## INSTRUCTIONS FOR COMPLETING THE APPLICATION FOR DISABILITY RETIREMENT AND ASSOCIATED DOCUMENTS

Please read the disability retirement information in your *Handbook for Members* before completing this application. You may obtain this handbook from your benefits administrator or view it on the VRS Web site ([www.varetire.org](http://www.varetire.org)). Use *myVRS* on the VRS Web site to estimate your VRS benefits before applying for retirement.

### *When submitting your application:*

- Include a readable copy of your birth certificate. If your birth certificate does not include your full given name and birth date, you must provide other legal documentation. Your application *cannot* be processed without this document.
- Include a readable copy of your survivor's birth certificate if you chose a survivor option. If your survivor's birth certificate does not include a full given name and birth date, provide other legal documentation.
- Have your employer complete Part E of this application if you are currently employed in a covered position or have been within the last 12 months.
- Complete and submit the Authorization for Direct Deposit of Monthly Benefit (VRS-57) and the Request for Income Tax Withholding (VRS-15). Processing of your retirement application is delayed if the VRS-57 is not completed and submitted with your application.

It is important to provide all required documents at the time of application. If all required documents are not received, VRS is unable to submit your file to the Medical Review Board. This will delay a determination in your disability case and may affect when your first benefit payment is made.

### *Considerations:*

At the time of retirement or upon receiving approval for disability retirement (whichever is earliest), you must terminate all full-time and part-time positions that are covered by VRS in order to receive a monthly retirement benefit. You must also terminate work in any part-time positions not covered under VRS for the employer from which you are retiring. If you return to work in a full-time position with any employer participating in VRS, your monthly retirement benefit must cease. You once again become an active VRS member.

If you plan to return to work in a part-time position with any employer participating in VRS:

- The duties of your new position cannot be similar to the duties of the position from which you retired, and
- Your employer must comply with Internal Revenue Service (IRS) rules about in-service distributions. For your employer to be in compliance, you must terminate all full-time and part-time employment with your current employer before you receive your benefit payment. In addition, you must incur a break in service of at least one full calendar month before returning to part-time employment in a position not covered by VRS with your current employer. This break must occur during a normal work period.

**Note:** State agencies are considered one employer. Retired state employees may return to work in part-time positions with other state agencies after a full calendar month break in service during a normal work period.

**Completing the Application for Disability Retirement**

*Complete Parts A through D*

(To avoid processing delays, print or type your information and ensure all items are completed.)

**Part A. Member Information**

Boxes 1-10: Enter your personal information. In Box 2, check whether this is your original application or if you are submitting a revised application.

Box 11: Enter the date you plan to retire (the first of any given month after your employment is terminated). If you leave this box blank, VRS will coordinate with your employer to arrange for the first possible retirement date.

Box 12: If you check yes, the purchase must be completed while you are actively employed and no later than your date of termination.

Box 13: If you check yes, be sure your employer has completed the on-line certification for your accumulated sick leave using myVRS Navigator. This option is irrevocable and cannot be reversed.

Boxes 18-19: At the time of retirement or upon receiving approval for disability retirement (whichever is earliest), you must terminate all full-time and part-time positions that are covered by VRS to receive a monthly retirement benefit. You must also terminate work in any part-time positions not covered under VRS for the employer from which you are retiring. Choose yes or no as appropriate, or choose "N/A" in box 16 if you have not been working in a part-time position and do not plan to do so prior to your date of retirement.

**Part B. Payout Option**

Choose one payout option. Refer to your *Handbook for Members* to determine which option will meet your retirement goal.

**Part C. Survivor Information**

Complete Part C *only* if you chose the survivor option in Part B. If you choose a survivor option, you *must* send a legible copy of your survivor's birth certificate with this application.

**Part D. Certification**

Box 28: Sign and date the application.

If you are unable to sign the application and you selected the Survivor Option in Part B, only an individual specifically authorized to make testamentary changes on your behalf may sign it. Authorized individuals include: a court-appointed Guardian or Committee; an Attorney-in-Fact named in a Durable Power of Attorney; or an individual specifically authorized by a court order to do so. A copy of the document providing such authorization must be presented to VRS for review before this application can be processed. If the application is not signed and dated, it is not valid and a new one must be completed. This may delay your first payment.

Box 29: If you checked Married or Separated in Box 7, your spouse must sign and date the application on or after the date you sign; otherwise, a new one must be completed. If you are unable to obtain your spouse's signature, contact VRS for additional information.

Have your employer complete Part E of this application if you are currently employed in a covered position or have been within the last 12 months.



**Completing the Other Required Documents**

In addition to the Application for Disability Retirement (VRS-6), the following forms must also be completed and submitted to VRS before your application can be processed. These forms include:

**Explanation of Disability (VRS-6A):** Complete this form to provide your interpretation of your job duties and how you are unable to perform them. You will enter information about yourself, about your employment and about your medical conditions and any treatments you have completed.

**Physician's Report (VRS-6B):** This form allows your physician to provide VRS with information about your condition. Give this form to your physician and ask that it be completed and submitted directly to VRS. The physician must also submit written diagnostic, objective findings to substantiate the diagnosis.

It is in your interest to choose an authorized medical professional that will cooperate with the VRS disability retirement process to the fullest. It is your physician's responsibility to do his or her best to fully document your illness so that the Medical Board understands how your illness impacts your job performance. The Medical Board will not evaluate you personally. Your physician's documentation may have an impact on whether or not your application is approved.

Note: You are responsible for your medical bills. Remember that VRS is not responsible for payment of fees to the physician for providing any medical information.

**Employer Information for Disability Application (VRS-6D):** The form must be completed by your employer to provide VRS information about your position.

**Request for Income Tax Withholding (VRS-15):** This form authorizes VRS to withhold taxes at a rate other than a rate for a married individual claiming three exemptions and zero exemptions for state taxes. You will enter your personal information and you will choose one federal income tax withholding option and one state option. You will enter the number of exemptions and any additional information you want withheld.

Note: Submit this form when applying for non-work related disability retirement. If you are applying for work-related disability retirement, you will be asked to submit this form if you will receive the VRS formula amount. This form is not required if you will receive the work-related guaranteed benefit, which is tax exempt.

**Authorization for Direct Deposit of Monthly Benefit (VRS-57):** This form authorizes VRS to transfer funds electronically to your financial institution. You will enter information about yourself and the account to which you will transfer funds. You will also tape a voided check to this form as VRS cannot accept hand-written account information.

**Note:** If you have fraud control or protection measures on the account that will receive your VRS benefit payment, you may want to check with your financial institution before VRS sends your first payment to be sure it is not rejected.



## Employer Responsibilities

**Application for Disability Retirement (VRS-6):** Complete Part E and verify the application has been completed in its entirety, signed and dated as required. (To avoid processing delays, print or type your information and ensure all items are completed.)

Box 4: For members in a political subdivision, select the job name for the last position held if listed. Members in these positions may be eligible for the state's health insurance credit.

Box 5: If the member is covered by hazardous duty provisions, check the applicable box.

Boxes 8-15: This information is used to project creditable compensation received up to the effective date of retirement. If there is a change in this information, submit a Change to Certification (VRS-49) to update the information on this form. Using *myVRS Navigator*, you must also correct any payroll reported error that resulted from changes in these items or in the creditable compensation used to calculate the average final compensation. To avoid an erroneous payment to the retiree, submit changes to VRS immediately.

**Employer Information for Disability Application (VRS-6D):** Complete this form to provide VRS information about the employee's position and job status.

Ensure the member has included the following forms with the Application for Disability Retirement (VRS-6):

- Explanation of Disability (VRS-6A)
- Physician's Report (VRS-6B), if it has been completed previously. This document may be forwarded directly from the physician to VRS.
- Request for Income Tax Withholding (VRS-15)
- Authorization for Direct Deposit of Monthly Benefit (VRS-57)

Review the birth certificate (and the survivor's birth certificate if applicable) to ensure it is readable.

**Note:** VRS recommends a copy of the application be faxed to VRS in the case of life threatening illness.

## EXPLANATION OF DISABILITY



VIRGINIA RETIREMENT SYSTEM  
P.O. Box 2500 ♦ Richmond, Virginia 23218-2500  
Toll Free 1-888-VARETIR (827-3847)  
[www.varetire.org](http://www.varetire.org)

Clear Form

1. Social Security Number

2. Name

3. Address (Street, City, State and Zip+4)		
4. Home Phone Number	5. Gender <input type="checkbox"/> Male <input type="checkbox"/> Female	6. Date of Birth (mm/dd/yy)
7. Employer		8. Job Title
9. Dates of Employment Initial hire date _____ Date you began this job _____	10. Are you still working? <input type="checkbox"/> No - Enter date last worked _____ <input type="checkbox"/> Yes - Employer must complete Form VRS-6D	11. Date leave without pay began (mm/dd/yy)
12. Supervisor Name and Phone Number		

Very careful consideration should be given to the following section of your application. Fully describe the medical problem so that we can understand why you feel unable to continue your job.

13. In your own words, list all the job duties you are required to perform on a regular basis:
14. Which of your duties listed above can you NOT perform?
15. What illness or injury prevents you from working?
16. Number of days lost from work during last year due to this disability: _____ Explain:
17. In what way(s) has your doctor told you to restrict your activities?
18. Are your home duties, school activities or abilities to care for your personal needs limited in any way? <input type="checkbox"/> No <input type="checkbox"/> Yes If yes, please explain:

VRS-6A (Rev. 12/12)



19. SSN

<b>20. Have you ever been treated at a hospital or clinic for your disability?</b> <input type="checkbox"/> No <input type="checkbox"/> Yes <b>Were you admitted to a hospital?</b> <input type="checkbox"/> No <input type="checkbox"/> Yes (If yes, attach discharge summary) List the name, addresses, dates and reasons for hospitalizations or clinic visits and the types of treatment received concerning your disability so that records may be obtained if VRS needs them. <table border="1"> <thead> <tr> <th>(Name of Hospital)</th> <th>(Address)</th> <th>(Dates)</th> <th>(Reason)</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>				(Name of Hospital)	(Address)	(Dates)	(Reason)																
(Name of Hospital)	(Address)	(Dates)	(Reason)																				
Name of physician treating disability			Physician's Phone Number																				
Physician's Address (Street, City, State and Zip+4)																							
Date you first saw physician	Date you last saw physician	How often do you see the physician?																					
<b>21. List the names and address of any other physicians that you have seen in the past year related to your disability:</b> <table border="1"> <thead> <tr> <th>(Name)</th> <th>(Address)</th> <th>(Reason for Visit)</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> </tbody> </table>				(Name)	(Address)	(Reason for Visit)																	
(Name)	(Address)	(Reason for Visit)																					
<b>22. Certification</b> I hereby certify that all information I have given in this document is true and understand that any willful falsification of facts presented may result in a denial of my application for disability retirement and prosecution for a Class 1 misdemeanor as provided by law. I authorize any physician, agency or other organization to disclose any medical records or other information regarding my disability to the Board of Trustees and the Medical Review Board of the Virginia Retirement System. I also hereby authorize VRS to disclose any medical records or other information regarding my disability to any physician, agency or organization as may be required for my disability determination. <table border="1"> <tr> <td>Member Signature</td> <td>Date</td> </tr> </table>				Member Signature	Date																		
Member Signature	Date																						

## PHYSICIAN'S REPORT



**VIRGINIA RETIREMENT SYSTEM**  
P.O. Box 2500 ♦ Richmond, Virginia 23218-2500  
Toll Free 1-888-VARETIR (827-3847)  
Fax 1-804-786-9718  
[www.varetire.org](http://www.varetire.org)

Clear Form

1. Social Security Number

2. Name

The physician or other medical professional completes this form to describe the patient's illness(es) or condition(s) that may qualify the applicant for disability retirement. This information is used to make a decision about the applicant's disability retirement application.

**Note:** Review Part D to ensure all information supporting the diagnosis and treatment are submitted with this report.

### PART A. DESCRIPTION OF DISABLING ILLNESS

3. List the physical functional limitations preventing the applicant from performing his or her usual work duties:

### PART B. DIAGNOSIS AND TREATMENT

4. Indicate the diagnosis(es) and the onset date (for each), and whether each is causing or contributing to the disability:

<u>Diagnosis (Full diagnostic description)</u>	<u>Date of Onset</u>	<u>Causing or Contributing?</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

5. Date the patient became unable to work:

6. Date of patient's most recent visit (which must have been within the last 6 months):

7. Date of patient's first visit pertaining to this disability:

8. List the initial objective findings:



9. SSN

10. List all current medications:			
<u>Medication</u>	<u>Dosage</u>	<u>Duration</u>	<u>Patient Compliance?</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

11. Description of any other treatment including therapy, patient compliance and response:

12. What improvement can be expected within one year of treatment?

13. Report any hospitalizations including special tests and or examinations for heart, vision and radiology:

14. Describe any surgical procedures performed on the patient including name, description of procedure, and response:

15. How has the patient's condition improved, remained unchanged, or worsened over the past year?

16. Do you consider the patient's disabling condition(s) likely to be permanent?  
☐ Yes      ☐ No



17. SSN

**PART C. MEDICAL PROFESSIONAL INFORMATION**

<b>18. Name of Practice</b>
<b>19. Medical Professional's Name</b> (First, Middle Initial, Last)
<b>20. Mailing Address</b> (Street, City, State and Zip+4)
<b>21. Telephone Number</b>
<b>22. Medical Professional Signature</b> <b>NOTE:</b> Unless otherwise specified, the Virginia Retirement System will <i>not</i> assume any responsibility for payment of fees for furnishing the requested information.  <div style="display: flex; justify-content: space-between;"> <div>Signature _____</div> <div>_____ Date</div> </div>

**PART D. DOCUMENTATION REQUIRED TO SUBSTANTIATE CLAIMS**

If the disability application is based on any of the conditions listed in this section, the following documentation is *required* where pertinent to the disability. Place a check by the type of condition and by all attachments being submitted.

If the disability application is *not* based on any of the conditions listed in this section, the physician's responsibility remains to provide any documentation such as consultations, radiology reports, other reports, special tests, laboratory or diagnostic studies and support the diagnosis.

☐ **Musculo-Skeletal**

- ☐ Report on any surgical treatment, including name of procedure and/or copy of operative note
- ☐ Current comprehensive Orthopedic examination
- ☐ Report on rheumatoid factor and sedimentation rate
- ☐ Report on uric acid relative to gouty arthritis
- ☐ Physical finding for all joints involved, including any deformities, tissue and bone destruction, range of motion and limitation of motion
- ☐ Current reports of radiology reports of involved joints

☐ **Cardiac**

- ☐ EKG and echocardiograms
- ☐ Reports on exercise tolerance and stress
- ☐ Answers to the following questions: Is the patient able to climb one flight of steps or walk 200 yards on level ground? Do such activities bring on severe dyspnea and/or angina? Or what duration of physical activity can the patient tolerate?
- ☐ Location of edema
- ☐ Report of any other physical findings

☐ **Cancer**

- |  |                                      |
|--|--------------------------------------|
| <input type="checkbox"/> Report on the stage of cancer | <input type="checkbox"/> CT scans    |
| <input type="checkbox"/> Treatment Plan                | <input type="checkbox"/> Bone scans  |
| <input type="checkbox"/> Oncology report               | <input type="checkbox"/> Lab Results |

23. SSN

☐ **Respiratory**

- ☐ Frequency, duration and severity of acute attacks of asthma, bronchitis, etc.
- ☐ Answer to the following question: Is the patient able to climb a flight of stairs or walk 100 yards without dyspnea?
- ☐ Frequency of emergency room visits or hospitalization each year
- ☐ Report of current pulmonary function studies, predicted and actual values with the results expressed in the CCs or liters and also in percent. Include the oxygen and carbon dioxide level of room air.

☐ **Neurological**

- ☐ Current comprehensive neurological examination dated within the last six months
- ☐ If the condition is a seizure disorder, give the frequency and severity of the seizures in the past year
- ☐ Report on current EEGs, CT scans, MRIs with dates
- ☐ Report on any of the following conditions which are present, indicating severity, distribution, and residual function in affected parts: Atrophy, paralysis, hemiplegia, impaired speech, tremors, gait, reflexes, and mental disturbances (including a report on cognitive ability)

☐ **Psychiatric**

- ☐ Psychiatric signs and symptoms
- ☐ Report of current psychiatric consultation to include disabling symptoms, diagnosis, treatment, and prognosis
- ☐ Number of appointments with psychiatrist, psychologist or medical social worker in the past two-year period and date of last appointment

☐ **Diabetes**

- ☐ Symptoms and complications
- ☐ History including onset date, length of treatment, and weight loss
- ☐ Current treatment, including insulin and medications
- ☐ Report on current blood sugars with date and/or A1C
- ☐ Report on current urinalysis with date

☐ **Visual**

- ☐ Report on visual acuity after best correction: R 20/\_\_\_\_ and L 20/\_\_\_\_
- ☐ Report of visual fields, including chart, if indicated
- ☐ Report on fundoscopic findings
- ☐ Description of ocular tension
- ☐ Description of therapy and prognosis
- ☐ Information about whether or not the patient drives an automobile

☐ **Auditory-Vestibular**

- ☐ MRI or CT reports
- ☐ Audiogram with respect to puretone, SRT, and speech discrimination
- ☐ If patient has hearing aids, indicate the aided thresholds with respect to SRT and speech discrimination
- ☐ If vertigo or Menieres disease:
  - o Frequency, duration and severity of attacks
  - o ENG report
  - o Report on vestibular function and gait
  - o Report of any medical and surgical treatment

☐ **Digestive**

- ☐ Report on symptoms and treatment
- ☐ Endoscopies, radiological reports, and special studies
- ☐ Complete report of current lower or upper GI series with date, if pertinent

☐ **Fibromyalgia**

- ☐ Report of any tender points
- ☐ A functional capacity evaluation for the patient's job
- ☐ Psychiatric report, if applicable

☐ **Other** (Describe all documentation enclosed such as test results, consultation notes.)

VRS-6B (Rev. 08/16)



**School Bus Driver's  
APPLICATION FOR PHYSICIAN'S CERTIFICATE**

This form is required under the Section 22.1-178 of the  
Code of Virginia Regulations of the Board of Education

**DRIVERS NAME (Printed)** \_\_\_\_\_

**DRIVERS LICENSE NUMBER** \_\_\_\_\_ **BIRTH DATE** \_\_\_\_\_

**ADDRESS** \_\_\_\_\_

**Medical History (To be completed by applicant)** Please check if you have any history of the following conditions:

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Diabetes   | <input type="checkbox"/> Heart Disease         | <input type="checkbox"/> Loss of vision    |
| <input type="checkbox"/> Seizure Disorder   | <input type="checkbox"/> High Blood Pressure   | <input type="checkbox"/> Loss of Hearing   |
| <input type="checkbox"/> Head Injury causing symptoms   | <input type="checkbox"/> Paralysis of any Type | <input type="checkbox"/> Tuberculosis (TB) |
| <input type="checkbox"/> Brain Tumor  | <input type="checkbox"/> Muscle Disease        | <input type="checkbox"/> Shoulder Injury   |
| <input type="checkbox"/> Nervous or psychiatric disorders (severe depression) <input type="checkbox"/> Sleeping Disorders (report sleep apnea and/or periods of drowsiness) |  |  |

1. Have you ever received treatment for or been recommended by a physician for treatment of alcoholism or drug abuse? YES ☐ NO ☐
2. Do you currently feel that you use alcohol to excess? YES ☐ NO ☐
3. Do you currently use psychoactive drugs such as marijuana, cocaine, or other similar drugs? YES ☐ NO ☐
4. Are you currently taking any prescribed medications? YES ☐ NO ☐
5. If yes, to question 4, which medication is it? \_\_\_\_\_
6. Do you have hay fever or other minor illness, which require you to take over the counter (non-prescription) medications at this time? YES ☐ NO ☐
7. If yes, to question 6, please list medication(s): \_\_\_\_\_

**I certify I have answered the above questions truthfully and to the best of my ability. I hereby authorize the physician to release the information contained on this certificate to the school division.**

**Employee Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Examining Physician Comments:** \_\_\_\_\_

**PHYSICAL QUALIFICATIONS FOR COMERCIAL MOTOR VEHICLE DRIVERS**

1. No person shall drive a school bus unless that person is physically qualified to do so and has submitted a School Bus Driver's Application for Physician's Certificate signed by the applicant and the doctor for the applicable employment period.
  2. A person is physically qualified to drive a school bus if the individual:
    - a. Has no loss of a foot, a leg, a hand, or an arm which interferes with ability to control and safely drive a school bus without reasonable accommodations;
    - b. Has no impairment of the use of a foot, a leg, a hand, fingers, or an arm, and no other structural defect or limitation likely to interfere with ability to control and safely drive a school bus without reasonable accommodations;
    - c. Has no known medical history or clinical diagnosis of diabetes mellitus currently requiring insulin --for control;
    - d. Has no current clinical diagnosis of myocardial infraction, angina pectoris, coronary insufficiency, thrombosis, or any other cardiovascular disease of a variety known to be accompanied by syncope, dyspnea, collapse, or congestive cardiac failure;
    - e. Has no know medical history or clinical diagnosis of respiratory dysfunction likely to interfere with the ability to control and drive a school bus safely without reasonable accommodations;
    - f. Has no known current clinical diagnosis of high blood pressure likely to interfere with the ability to operate a school bus, blood pressure reading must be less than or equal to 160/90;
    - g. Has no known medical history or clinical diagnosis of rheumatic, arthritic, orthopedic, muscular, neuromuscular, or vascular disease which would interfere with the ability to control and operate a school bus safely without reasonable accommodations;
    - h. Has no known medical history or clinical diagnosis of epilepsy or any other condition which is likely to cause loss of consciousness or any loss of ability to control a school bus safely without reasonable accommodations;
    - i. Has no known mental, nervous, organic, or functional disease or psychiatric disorder likely to interfere with the ability to drive a school bus safely without reasonable accommodations;
    - j. Has both distant and near visual acuity of at least 20/40 (Snellen) in each eye with or without corrective lenses, and field of vision of at least 70 degrees in the horizontal meridian in each eye, and the ability to recognize the colors of traffic signals and devices showing standards red, green, and amber;
    - k. First perceives a forced whispered voice in the better ear at not less than 5 feet with or without the use of a hearing aid or, if tested by use of an audiometric device, does not have an average hearing loss in the better ear greater than 40 decibels at 500 Hz, and 1,000 Hz and 2000 Hz with or without a hearing aid when the audiometric device is calibrated to American National Standard (formerly ASA Standard) z24.5-1951
- Note:** Bus drivers should also refer to their Pupil Transportation Manual (PTM) often for additional information and updates.



Employee License Number \_\_\_\_\_

**\*Note to physician please ask genital question before performing physical examination.**

**\* Genital exam optional. If not desired, write "NO" and initial here**

(Applicant initials) (Physician initials)

Visual Acuity without Corrective Lenses

Distant R20 / \_\_\_\_\_

L20 / \_\_\_\_\_

Near R20 / \_\_\_\_\_

L20 / \_\_\_\_\_

Visual Acuity with Corrective Lenses

Distant R20 / \_\_\_\_\_

L20 / \_\_\_\_\_

Near R20 / \_\_\_\_\_

L20 / \_\_\_\_\_

Color Vision \_\_\_\_\_ Visual Fields to 140 degree Horizontal sweep \_\_\_\_\_

Hearing: R \_\_\_\_\_ L \_\_\_\_\_

**Audiometry (May be completed by other qualified persons if authorized by examining physician)**

Decibel Loss without Hearing Aid at:

R 500 Hz \_\_\_\_\_

R 1000 Hz \_\_\_\_\_

R 2000 Hz \_\_\_\_\_

L 500 Hz \_\_\_\_\_

L 1000 Hz \_\_\_\_\_

L 2000 Hz \_\_\_\_\_

Decibel Loss with Hearing Aid at:

R 500 Hz \_\_\_\_\_

R 1000 Hz \_\_\_\_\_

R 2000 Hz \_\_\_\_\_

L 500 Hz \_\_\_\_\_

L 1000 Hz \_\_\_\_\_

L 2000 Hz \_\_\_\_\_

Audiometric Test Performed By \_\_\_\_\_

Ht. \_\_\_\_\_ Wt. \_\_\_\_\_ B.P. \_\_\_\_\_ Pulse \_\_\_\_\_

Check if Normal:

☐ Head

☐ Lungs

☐ Extremities

☐ Eyes

☐ Heart

☐ Neurologic

☐ Ears

☐ Abdomen

☐ Urinalysis

☐ Throat

☐ \* Genitalia

☐ X-ray, EKG, & TB Skin Test Data: ☐ Positive ☐ Negative Date of Test: \_\_\_\_\_

Comments: \_\_\_\_\_

I am duly licensed physician in Virginia, License No. \_\_\_\_\_

I certify that I have reviewed the Medical History as written hereon, examined the patient as noted above with the knowledge of his/her duties and the "Physical Qualification For School Bus Drivers", I find without restrictions \_\_\_\_\_ with corrective lenses \_\_\_\_\_ with a hearing aid \_\_\_\_\_

As best I can determine by reviewing the history and exam as above, I have no reason to suspect that the applicant uses illegal drugs or excessive amounts of alcohol.

Physicians Signature: \_\_\_\_\_ INOVA Facility: \_\_\_\_\_

Physicians Name Printed: \_\_\_\_\_

Physicians Phone: \_\_\_\_\_ Date: \_\_\_\_\_

**Notes:** [1] Examining physicians should be aware of the physical demands, mental strain, and emotional responsibilities placed on school bus drivers. In the interest of public safety, the examining physician is required to certify that the driver does not have any physical, mental or organic defect of such a nature that will affect the driver's ability to operate a commercial motor vehicle (school bus) safely.

[2] This report must be signed personally by the examining physician and returned to:

Fairfax County Public Schools, Attn: Virginia Sellers, Employee Testing and Compliance Specialist

8115 Gatehouse Road, Suite 2122, Falls Church, Virginia 22042 or Fax to: 571.423.5055 / Email to: vesellers@fcps.edu